DOCUMENT RESUME

ED 434 618 HE 032 396

AUTHOR Taylor, Gordy; Onion, Cathy
TITLE Alumni Relations: Launching Your Program. Management Tools.
INSTITUTION Council for Advancement and Support of Education, Washington, DC.
ISBN ISBN-0-89964-324-8
PUB DATE 1998-00-00
NOTE 158p.; Foreword by William J. Evitts.
AVAILABLE FROM Council for Advancement and Support of Education, 1307 New York Ave., NW, Suite 1000, Washington, DC 20005-4701 (CASE members $35, others $52). Tel: 800-554-8536 (Toll Free).
PUB TYPE Books (010) -- Guides - Non-Classroom (055)
EDRS PRICE EDRS Price MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS *Alumni; *Alumni Associations; Higher Education; Institutional Mission; Long Range Planning; Organizational Development; *Program Development; *Public Relations; Strategic Planning
IDENTIFIERS *Alumni Relations

ABSTRACT

This book is a how-to manual on creating an alumni relations program, including starting an alumni association. Brief sections address the following topics: defining purpose, launching the organization, establishing a membership policy, establishing a budget, writing a mission statement, creating a long-range plan, working with the development office, building the team, leading the team, maintaining records, tracking down lost alumni, staying in touch, structuring the board, and setting up programs. The bulk of the book consists of four appendices which provide the following resources: (1) sample mission statements, strategic and long-range plans, and goals and objectives; (2) sample organizational charts and job descriptions for the alumni office; (3) sample constitutions and bylaws for the alumni association; and (4) programming resources. (Contains 45 references.) (DB)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

Management
Tools

ED 434 618

Alumni Relations: Launching Your Program

BY GORDY TAYLOR AND CATHY ONION

With a foreword by William J. Fritts

HE 032 390

BEST COPY AVAILABLE

CASE
Books

PERMISSION TO REPRODUCE AND DISSEMINATE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

N. Raley

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

2B

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

- Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

Management
Tools

Alumni Relations: Launching Your Program

BY GORDY TAYLOR AND CATHY ONION

With a foreword by William J. Evitts

CASE
Books
COUNCIL FOR ADVANCEMENT
AND SUPPORT OF EDUCATION

Copyright 1998 Council for Advancement and Support of Education
ISBN 0-89964-324-8
Printed in United States of America

Council for Advancement and Support of Education (CASE) is the international education association serving professionals in the disciplines of alumni relations, communications, and philanthropy.

CASE offers high-quality training, information resources, and a wide variety of books, videotapes and materials for advancement professionals.

For more information on CASE or a copy of our product catalog, visit our Web site <http://www.case.org> or call (202)328-5900.

Book design: Fletcher Design, Washington, DC
Editing: Cathryn Seymour Dorsey

CASE BOOKS
Council for Advancement and Support of Education
11 Dupont Circle, Suite 400
Washington, DC 20036-1261

Editor's Note

In writing and compiling the material in this book, our team made every attempt to reflect the various sizes, types, and nationalities of institutions represented in the CASE membership.

The editorial information presented reflects our authors' considerable experience with alumni programs in the United States. Although conditions may be different for members outside the United States, we believe that they can adapt the strategies and recommendations to their situations.

The samples in the appendixes are those we were able to obtain prior to publication. They represent a variety of alternatives, but do not cover every size and type of institution. Additional samples may be obtained from the CASE Information Center.

This book focuses on the steps involved in initiating an alumni relations program and setting up an alumni association. For information on developing and implementing alumni programming, we have included a list of CASE publications and resources in appendix IV.

ACKNOWLEDGMENTS

Authors Gordy Taylor and Cathy Onion wish to thank their spouses, Diane and Steve, for their patience and understanding, the Western Illinois University Student Alumni Council for their continual inspiration, and the WIU Alumni staff for support during this project— particularly Lori Gentle for her flawless typing of the manuscript.

The CASE BOOKS editorial staff wishes to thank content reviewer Jim Marberry and sample contributors Laurence R. Schiemann, Ashland University; Charles J. DiGange, Loyola University, New Orleans; Steven Diguiseppe, Millersville University; Charles Roddy, Old Dominion University; Nancy Dysart, University of Maine; Laurel Rossnagel, University of Saskatchewan; Dan J. Mueller, Marquette University; Sally B. Emerson, Viterbo College; Mary Breunig, University of California at Berkeley College of Engineering; Mariann J. Hunter, Plymouth State College; Salvatore Quintana, New Mexico Highlands University; Anita Herington, Kent State University; Michael J. Ferin, University of Indianapolis; Matthew J. Watkins, Clemson Alumni Center; Susanna Botos, United States International University/California Western University; Joyce A. Falk, Columbus State Community College; James Diverio, Drew University; Barbara Todd, Illinois State University; Amy Button Renz, Kansas State Alumni Association; Jennifer R. Bosk, Indiana University-Purdue University at Fort Wayne; Donald G. Brackhahn, Missouri School of Mines - the University of Missouri/Rolla; Randy Gehl, Clarke College; James McAuley, Jackie Ballinger, Berea College; Michael Connelly, Catonsville Community College; Dwight D. Clasby, Brunswick School; Katrina McLean, Acadia University; Diane Benninghoff, Colorado College; Sharron Sherrill, Community College of Allegheny County; and Midge Wood Brittingham, Oberlin College Alumni Association.

Also of great assistance were designer Richard Fletcher, editorial consultant Shirley Sirota Rosenberg and CASE Staff members Paul Chewning, Barbara Perkins, Shannon Joyce, and Laura Jackson.

AUTHOR PROFILES

William J. Evitts taught American history at Hollins College for 15 years before coming out of the volunteer ranks to be director of alumni relations at his alma mater, Johns Hopkins University. After a stint as senior vice president for the Barton-Gillet Company (Baltimore) he became executive director of alumni relations at State University of New York at Buffalo in 1991. He has been a contributor to CASE CURRENTS and CASE's *Handbook on Alumni Administration*, a CASE conference faculty member, and a member of the Commission on Alumni Relations.

Gordon A. Taylor Jr. earned a bachelor of business degree at Western Illinois University and an MBA and Ph.D. at the University of Florida. He returned to WIU to teach in the College of Business for eight years prior to assuming his current position, associate vice president for alumni programs in 1978. He has been program and conference chair for CASE District V, a contributor to CASE CURRENTS, a conference faculty member at CASE international and district conferences. Under his direction, the Western Illinois University Alumni Association has won seven CASE awards, including the Grand Gold Award for overall program excellence in 1994.

Cathy Onion received her bachelor's and master's degrees from Western Illinois University and has served her alma mater as associate alumni director since 1986. She has been a contributor to CASE CURRENTS, a frequent speaker at CASE international and district conferences, and currently serves on the CASE District V conference committee.

FOREWORD

It is never too late to create an alumni relations program. Instead of having to update an outmoded model, newcomers to the process have the opportunity to take a fresh approach. This how-to manual on starting an alumni association will particularly appeal to those with the wit, creativity, and enterprising nature to capitalize on changing times.

The template for alumni relations programs was developed in the 19th century. Back then, the alumni—not their alma maters—created alumni associations. Those alumni groups developed programs that brought people together at a set time and place—usually at a cost to the alumni—for homecoming, class-year reunions, club events in distant cities, group travel programs, or continuing education. The institution supplemented this "live" programming by sharing news of both the association and the university, and letters from graduates, through alumni publications.

This pattern of alumni activity arose during an era when colleges and universities were highly exclusive organizations populated by full-time students. Students shared a curriculum with common elements and the privilege of matriculating with others of a similar socioeconomic class and often the same gender. United by social standing and memories of shared experiences, they went on to establish the traditional "old boy network"—a career connection suited to their homogeneity. To be an alumnus was to be united with others by memory, social standing, and nostalgic common experience.

In the past half-century, higher education in the United States has changed dramatically. Commonalities that supported the old style alumni relations are no longer the rule. College attendance is widespread. Thanks largely to the post–World War II GI bill, which flooded American campuses with more than a million new students, and the growth of lower-cost state institutions, college attendance has grown exponentially. Before 1940, only 4.6 percent of Americans had completed four or more years of college. By 1995, Americans over 25 who had completed four or more years of college reached 23 percent.

In addition to their increased numbers, today's graduates are vastly different from their predecessors. Because the college population is more diverse, both the college experience and life after college have become more individualized. What was a privileged benefit for a few has become a common necessity for most. College is now an instrumental choice, a means to an end beyond itself. On top of that has come a revolution in communication technology and in lifestyles. Significantly, the institutions and not the graduates take the lead in creating alumni relations programs and the purposes are more institutionally centered.

New institutions, public colleges and universities, commuter colleges, and two-year colleges should think carefully before setting out to mimic the model of alumni relations developed for institutions that flourished in a vastly different time. Nontraditional institutions that try to emulate those traditional programs not only risk failure, but throw away the advantage of a fresh perspective for a new age. Indeed, erosion of the old alumni program formulas is even noticeable at institutions that resemble the classic version of the American experience. They have difficulty recruiting volunteers and sustaining former programming levels. Thus, a flagship state university in the Northeast has abandoned class-year reunions. A Big Ten university has dropped its 25th reunion for a lack of interest. A major public university in the Southwest now holds only a 50th reunion.

Nevertheless, the overall purpose of alumni relations—to build a relationship between graduates and alma mater—has changed little. What has changed is the context in which these associations are being established and the approach they are taking to formulate their programs. Alumni relations today is more about the present and future than it is about the past.

If you're contemplating establishing a program for alumni relations, the first question you should ask yourself is "Why?" Then ask, "Whom will the alumni association serve: the institution itself, the graduates, or both?" Form should follow function. If financial needs alone require an institution to court its alumni, then it might pay to cut to the chase and stick with a pure fund-raising program. If, on the other hand, the idea is to involve graduates in college affairs, it makes sense to set up an alumni association that meets the needs of the college and the alumni.

Without the collective nostalgia and built-in loyalty of old alumni, response will be based on how well and how swiftly your program meets contemporary needs. You don't need elaborate market research to identify those needs. Most are obvious: The modern graduate needs continuing career services, constant access to education that upgrades skills and knowledge, access to group benefits (which employers are supplying less and less), a sense of community, and a means to keep in touch.

Fortunately, alumni communication is changing as much as alumni programming. The ability to replace or supplement one-way print media and the telephone with new, electronic technologies is making it possible to communicate with members quickly and less expensively. You can "talk" with alumni weekly, or even daily, and get instant feedback. You can even "talk" around the clock. It is no wonder that alumni relations programs exploiting the latest interactive communication techniques are already a step ahead.

Eventually, communication and programs tend to merge. Occupational groups, for example, are beginning to network with each other via their alma mater. Virtual communities of alumni in "chat rooms" and interest-group listservs are pinpointing and bringing together alumni with mutual interests. Live programming, even in its heyday, attracted only a small percentage of alumni in a given year. Interactive, virtual programming can reach just about everyone right in their offices and homes. Luring alumni physically back to their campuses is still useful, but in some cases less so than previously.

Although the exact shape of the future alumni relations program is speculative, the gradual extinction of past patterns is already evident. When starting an alumni association, don't make the mistake of clinging to models from an earlier era. Seize the advantage of starting from scratch.

William J. Evitts

William J. Evitts
Executive Director of Alumni Relations
State University of New York at Buffalo

CONTENTS

ACKNOWLEDGMENTS v
AUTHOR PROFILES vii

FOREWORD ix
William J. Evitts

GETTING STARTED 1
Gordy Taylor and Cathy Onion

APPENDIXES
I. Mission Statements, Strategic and Long-Range Plans, and Goals and Objectives 15
II. Organizational Charts and Job Descriptions for the Alumni Office 49
III. Constitutions and Bylaws for the Alumni Association 101
IV. Programming Resources 141

GETTING STARTED

Alumni professionals today face vastly different cultures than their predecessors. Institutional size, academic focus, and reputation; geographic location; number of alumni; public or private sponsorship; two-year or four-year curricula and a host of other variables all come into play to make each alumni association unique both to an institution and among other groups within the institution.

Regardless of university culture, however, alumni constituencies are basically the same; they are products of their alma maters. In addition, all alumni associations are limited in one way or another by staff and budget constraints and diverse levels of institutional commitment. Don't be intimidated by other institutions whose alumni programs provide more services and perks than yours does. Just do the best you can with what you have.

DEFINING YOUR PURPOSE

Before you initiate a program, know what you want to accomplish. Ask your immediate supervisor a simple question, "Why do we want an alumni relations program?" Without specific goals, you will spin your wheels, exerting a lot of energy while getting nowhere. Possible reasons for cultivating alumni relationships include

- Advocating pertinent legislation
- Helping recruit students
- Garnering financial support
- Making employment connections for grads
- Creating institutional traditions

LAUNCHING THE ORGANIZATION

Before you do any further planning, obtain the support of someone with clout in the institution. If you can't secure such backup, you must convince decision makers elsewhere in your institution that, if your institution is to remain viable, an alumni relations program is not a luxury, but a necessity.

Actually launching your alumni program usually takes about two years. Initial steps typically include the following tasks:

- Updating alumni files to establish an accurate database;
- Gathering additional alumni information when possible, such as job title, address, home and business phone, e-mail, fax number, spousal information, children, primary college activities, donor history, etc.;
- Starting an annual, semiannual, or quarterly publication;
- Organizing an alumni board that will actually make an impact on institutional vitality and vision;
- Holding a number of regional meetings where alumni join together in fellowship, learn what is new at their alma mater, and get a view of the future; and
- Establishing a student alumni board that will provide a tangible and lasting link between the undergraduate experience and your alumni constituency.

This list is ambitious, so proceed carefully. Make sure your office has all the information and staff necessary to carry out each component. Do not spread yourself too thin.

ESTABLISHING MEMBERSHIP POLICY

The next step is to decide whom you will solicit for membership. Some alumni associations, especially those that don't charge dues, consider everyone who attended the institution an automatic alumni association member. Others will consider only those alumni who have earned a degree or a set number of credits.

Will a subscription to your alumni publication be among the membership benefits? Some alumni associations mail their publications to members only. At Western Illinois University (WIU), we consider all graduates to be alumni association members. We do not charge membership dues or subscription fees. By mailing publications to everyone, we keep all graduates informed about relevant happenings on and off campus and also update our address files on a regular basis. We do this because we never know when an alumnus will choose to get involved.

This operating philosophy costs money. Consequently, you need a reliable revenue stream. For this reason, there is increasing pressure for alumni associations to start collecting dues. Advantages of a dues structure are twofold: the ability to generate funding and to identify who is genuinely interested in becoming an alumni association member. If you decide to charge dues, you will have to keep accurate financial records. You will also probably want to set up membership categories (e.g., annual and lifetime), and decide how to treat married couples or other special cases. Dues can be avoided if you have an alternative source of funding, i.e., the institutional budget.

Seek advice on these matters from colleagues at other institutions. There is no right or wrong way. Your decision depends in great part on available resources and your perceived commitment of alumni to each other and to their alma mater. To determine the membership benefits that will accompany a dues-paying policy, consider what your campus has to offer and what your alumni might find appealing.

Membership benefits might include

- Travel and merchandise discounts
- Library access
- Preferred seating at athletic or cultural events
- Golf course privileges
- Career-related seminars

If your institution lacks a golf course, you might have another sort of athletic facility available to alumni. What can you offer on the World Wide Web? Perhaps travel and/or continuing education would appeal to potential members. Would younger alumni members be especially interested in networking opportunities—a business card exchange breakfast, for example?

ESTABLISHING A BUDGET

At first, your institution will probably have to come up with your entire operating budget. Eventually, your programs could generate additional revenue. Excluding salaries, a new program serving fewer than 20,000 alumni in today's economy typically requires the following basic budget to get up and running.

Expense	**US Dollars**
Printing (e.g., brochures, periodicals, invitations)	20,000
Office supplies	5,000
Travel	5,000
Marketing	5,000
Events (e.g., meetings, reunions, seminars)	10,000
Equipment (e.g., cameras, software, computers)	10,000
Postage	5,000
Total expenses	60,000

When pitching your budget to pertinent campus or alumni board administrators, emphasize that your "customers," unlike other campus constituencies, grow in number annually. You will need to increase your budget accordingly in subsequent years. Remember also to allow for equipment repairs, computer upgrades, and postal rate increases.

WRITING A MISSION STATEMENT

Developing a mission statement will help you and your institution focus on why the alumni program deserves institutional resources. Ask colleagues and alumni board members for help. A mission statement should be explicit, to the point, and easy to comprehend. Appendix I contains examples of mission statements from a number of institutions.

CREATING A LONG-RANGE PLAN

Managers of a successful alumni association should anticipate, not react, to change. Plan for the long- as well as the short-term. The success of alumni associations affiliated with the University of Kansas, the University of Wisconsin, and the University of Pittsburgh, for example, is largely due to excellent planning.

Long-range planning should be based on the following assessments:

- Program strengths (e.g., alumni loyalty, donor base, successful programs, accurate records, excellent staff),
- Program weaknesses (e.g., lack of quality personnel and technology, no magazine/tabloid, small budget, no tradition),
- Potential opportunities (e.g., new or enhanced programs, links to campus community resources),
- Real and potential threats (e.g., inadequate resources, postal regulations and rate hikes, mobility of graduates, staffing, loyalty of alumni to their constituent group rather than the institution),
- External environment (e.g., national trends in technology and community service, future government budget allocations), and

---

SAMPLE ALUMNI ASSOCIATION GOAL AND OBJECTIVES

Goal: *To create greater student awareness of future responsibilities as alumni through an active alumni presence on campus.*

ONE-YEAR OBJECTIVES

a. On a regular basis, highlight alumni activities in student publications.
b. Provide alumni ribbons and school mugs for participants in placement office job fairs.
c. Maintain alumni council liaison structure with appropriate campus administrators.
d. Invite student leaders and faculty award recipients to an alumni council meeting.
e. Secure a display case in the student center during finals week to display photos of alumni award recipients and the criteria for the awards, a "good luck graduates" message, and information about the alumni association.
f. Discuss recruiting local alumni for career panels and speakers following student alumni council meetings.
g. Implement an alumni/admissions program to use alumni when recruiting students.

THREE-YEAR OBJECTIVES

h. Utilize career contact volunteers.
i. Send press releases to communicate alumni successes to students and prospective students.

FIVE-YEAR OBJECTIVES

j. Dedicate an alumni room in the student center and decorate it with memorabilia. Include a wall of honor with pictures of award-winning and other famous alumni.
k. Maintain a campus "office space" for visiting alumni where they can make phone calls and stash personal belongings.
l. Coordinate an "alumni day" to allow alumni to return to classrooms, participate in panels, and take part in other activities.

- Internal environment (e.g., institutional links in place and potential new relationships).

Planning should also be based on a brief statement of goals (five to 10 major initiatives that also take into account the need for program revisions or upgrades), plus an outline of specific goals and objectives stated in terms of one-year, three-year, and possibly longer time frames. Deadlines should be assigned to each objective and meeting these deadlines should be a priority. Set up a worksheet indicating what objectives you've accomplished toward each goal, current projects and their deadlines, and projects on hold.

WORKING WITH THE DEVELOPMENT OFFICE

At some colleges and universities, alumni relations programs are entirely subordinate to the development effort. At others, alumni relations form a separate entity, with little or no connection to development. Other alumni associations are totally independent. Most often, however, both the development office and alumni staff report to the same boss, but track their progress separately.

The old adage that alumni professionals are strictly "friend raisers" while development professionals are "fund raisers" is no longer true. Instead, their missions tend to merge. For example, alumni staff often identify major donor prospects and can even deliver campaign proposals when they are traveling on business. Alumni staff can also encourage development officers to attend alumni gatherings. The more people interacting at alumni events the better, as long as there is no specific mention of gifts and fund raising. As alumni professionals, you must be absolutely sure that any venture involving fund-raising staff does not compromise your alumni relations mission.

BUILDING YOUR TEAM

You must take care in assembling your alumni relations staff or team. The word *team* is important here, as that is precisely what you are doing: developing a team where everyone pulls together in pursuit of common goals. Alumni relations offices are notoriously understaffed, so you need multi-talented individuals who can blend together to accomplish diverse objectives. If possible, you need a minimum of the following: assistant director, secretary, receptionist, and record keeper. The reality in a small office is that you might not get funding for all these positions, so there may very well be overlapping job responsibilities. As staff sizes and number of alumni increase, you might find multiple people in certain positions, i.e., additional secretaries, record keepers, and staff members who deal with tours, regional clubs, constituency groups, membership, merchandise, lobbying, student alumni council, etc. In a small operation like ours, a single person finds him or herself wearing multiple hats every day.

Little needs to be said about the role of specific positions, as the titles are generally descriptions of job responsibilities. An assistant shares the creative and operative workload with you; a receptionist greets the public and answers the phone; a secretary handles correspondence and office management; and a record keeper updates files every day and helps you organize aggregate data. Examples of organizational charts and job descriptions can be found in Appendix II.

Who to hire is a crucial issue, particularly if you work in a small shop. Clock watchers, introverts, solo operators, low energy thin-skinned people need not apply. Specifically, you need two sets of attributes: balance and chemistry. In terms of balance, you need a combination of creators, thinkers, organizers, and detail people. You need thinkers and creators to challenge your staff and associates to stretch and explore possibilities outside their comfort zone. As Bill Evitts said in his foreword, the future is full of promise if we can embrace change and new ways of thinking about the challenges before us. You also need someone who can keep you on schedule and ensure that deadlines are met. Brochures need to be mailed, award recipients nominated and recognized, copy written and calendars planned for the next 12–18 months. This is important business—alumni professionals are driven by the calendar. While we must deal with the present, we must also be looking to the future as we plan events to engage our alumni in the life of their alma mater.

As you assemble your team, don't forget chemistry. Can these people work together? Can egos be checked at the door? There is so much to do that it is critical that everyone pull together and not worry about who gets credit, but rather find comfort in knowing they are a key component of a winning team.

Energy is a commodity your staff members must possess. They need to be positive and upbeat and enjoy their work, as you are constantly striving to broaden your base of institutional and alumni support. People who enjoy each other's company, while striving to attain a mutual goal will give you a staff that can't be beat.

LEADING YOUR TEAM

Albert Schweitzer said, "Example is not the main thing in influencing other people. It's the only thing." Treat your staff as you would like them to treat you. Give them the necessary resources for their job and let them do it. Success in alumni relations is a collaborative effort between you, your staff, the alumni board, and the alumni association.

Keep you staff energized and challenged and encourage them to stretch and grow. Schedule periodic staff retreats. Get out of the office to brainstorm and laugh a little as you expose yourself to constructive criticism. Be generous with your praise. A thank-you costs you nothing. A well-drafted letter, extra help with a mailing, overtime at an alumni event, or an exceptionally well-handled phone call are all worthy of your appreciation. Enthusiasm is both critical and contagious. And, if you do not enjoy your work, don't expect your staff to enjoy theirs.

MAINTAINING RECORDS

Keeping accurate records on graduates is the foundation of your alumni program. You can't implement programs if your institution can't find alumni. Recording data, however, is a double-edged sword: The more information you gather, the more you need to keep files up-to-date. The trick is finding a balance.

Overall, you will have to (1) make the alumni system compatible with the student records system, if possible, (2) control who handles data entry, (3) make certain beforehand you know how the information will be used, (4) ensure privacy, and (5) leave room for expansion.

Personal information. Most colleges and universities already have basic information collected when the alumni were students (e.g., full name, birth date, social security number, class year, major and degree, home address, home phone, parents' names). They usually also have graduate employment information that includes job title, company, company address, phone and fax numbers, and e-mail address. Transfer this information into your database fields. Your software should be compatible with the software maintaining student records so you can download the data each year.

Alumni will often state whether they wish to receive mail at home or at the office, so make sure your system can specify the preferred address. You also need a way to identify incorrect addresses, alumni who don't want any university mailings, alumni who want mail but no solicitations, and alumni who want to keep their addresses private. Many databases also have a "deceased" code, enabling you to keep names on the database for historical purposes while deleting them from mailing lists.

In assembling a database, determine how the data will be used. Will various departments use it to communicate with their alumni as well as the institution itself? Will the development office use it for the annual phonathon and contacts? Will pledge reminders be generated from information on the database? Will alumni officers want the data for reunion planning? The answers will help determine the difference between critical information you must keep and data that is merely helpful.

Donor information. Because the development office will frequently use the alumni database, you may want to reserve space for donor or potential donor information. In such a case, you will have to make some of the following decisions:

- What types of giving clubs should be recognized?
- How will pledge and reminder forms be generated?
- How will donors be recognized publicly?
- What kinds of mailings might be sent?
- Will labels be needed?

Accurate record keeping is vital when cultivating and recognizing donors. One way to ensure accuracy is to centralize data entry. Some bar-coding software, as well as postal regulations for automated mail, require that addresses be entered according to a specific format. It's best to have at least one person trained in this format and develop your own policies about entering information into the database. Another key issue is privacy. Basic personal information can be accessible to the entire campus, but most donor information should remain confidential.

Other information. You may want to supplement these basic records with additional data. A "comments" feature provided with your software is vital for storing information that doesn't fit anywhere else, such as alumni who don't use honorific titles or couples who prefer "John and Debbie Smith" to "Mr. and Mrs. John Smith." Consider including degrees earned from other institutions, social class year (i.e., the year the alumnus most associates with rather than actual class year), cross-references to other alumni (e.g., spouse, siblings, children, and parents) seasonal address and phone numbers, and notes on university events the alumnus has attended.

TRACKING DOWN LOST ALUMNI

Keeping track of alumni requires continuous effort. Following are ways to find lost alumni:

1. Make sure that envelopes for mailings other than first-class are clearly marked "Return service requested." This notation alerts the post office to your need for the most accurate address available. They will send you updated addresses, but will not forward the mailings. This service costs money, but it's worth every penny.

2. Ask alumni phonathon callers to update information on your constituency. A caller can lead off by requesting an address update ("to make sure you continue to receive our publications") before asking for a pledge. Make sure the callers get complete information, date the information, and record it legibly.

3. Putting together an alumni directory is a great way to update information. If you decide not to do this yourself (it can be a massive undertaking), make sure you deal with a reputable company. The CASE *Membership Directory* lists several such publishers in its index of products and services. Always check references and get a comprehensive cost profile before signing a contract. It's embarrassing to offer an alumni directory and then not be able to deliver a quality product on time. Set deadlines for yourself and adhere to them to establish a pattern of mutual trust between you and the publisher.

4. The World Wide Web is an increasingly useful tool for obtaining information about alumni. Alumni, including "lost souls," can access your World Wide Web page and enter or update their data. Online Yellow Page directories are available on the Web, but associations must use these with caution. The "John Smith" you find online, may not be your graduate "John Smith."

5. Sometimes, you can find lost alumni by mailing tracer cards to parents. List groups of lost alumni (you can never list all of them!) in alumni publications. Invite readers to contact you with updated information.

6. A number of agencies can track down alumni if you have a U.S. Social Security number. There are likely similar companies in other countries as well. If your records are in bad shape, it may be worth the expense. These companies are also listed in the CASE Membership Directory. You can also call CASE colleagues at other institutions to locate a reputable organization.

STAYING IN TOUCH

Periodicals. You need a publication to communicate regularly with your members. It can be a glossy magazine or tabloid-size newspaper. Magazines are more impressive but are expensive to produce, require substantial staff, and cannot always carry the latest information. Printed on newspaper stock, tabloids are inexpensive and quick to produce and can include more up-to-date news. Either vehicle can carry ads, but fall under different postal regulations. If you are financially strapped, the best option is the tabloid.

Establish a good relationship with the staff at your local post office. Not only can they answer your questions about how to reduce your mailing costs, but they can also give you general advice on the most cost-effective way to handle all types of mailings. If you offer an affinity credit card to alumni association members, you could ask the credit card company to send out brief association messages on the monthly bill.

Events. You can also keep in touch with alumni by holding events in their areas. Every time you schedule an event away from the campus, contact all the alumni residing in the vicinity. Not everyone will attend, but you've let them know you tried to see them. You can also get address updates at these events.

Electronic media. An institution with interactive electronic communication is way ahead of the pack. While some of us have a fear of e-mail and the World Wide Web, it is essential for us to master these tools, especially if we hope to appeal to our young, computer-savvy alumni.

STRUCTURING YOUR BOARD

Decide whether you will have elected or appointed board members. If this is your inaugural board, the responsibility falls on you and appropriate administrators to determine its composition. The board, with your guidance, decides on the content of the constitution, including details on membership in the association, length of term in various positions, purposes of the association, and committee structure. They should keep the constitution manageable, streamlined, functional, and flexible.

If you hold elections for the board, you must decide who is eligible to vote. Mailing ballots costs money, so you'll probably have to narrow the voting body. If you have only one candidate for every vacant position, you may not want to have an election at all.

If members are appointed to the board, a standing committee or the executive committee can collect and evaluate applications to join the board. Most alumni professionals concur that the board should not become a hand-picked clique, so keep this potential obstacle in mind when you make your decision.

Boards typically have 18 to 36 members, but size can range from a dozen to more than 100. Most meet three to four times a year, with members serving staggered terms, and limits imposed on how many consecutive terms a board member can serve.

The typical board's executive committee consists of a president, vice president, secretary, past president, and chief alumni staff member. The executive committee's function is to provide guidance and leadership for the alumni association in general and the alumni board in particular. Executive committee members are elected by the board.

Board members also serve on other committees, which run the gamut of admissions, travel, membership, fund-raising, athletics, awards, and recognition. It is an ongoing challenge to keep committees energized and focused, but it can be done if you make it a priority. Give committees specific tasks, make sure their responsibilities are understood, and hold them accountable.

Before a board is in place, you have to decide what each board member is supposed to do. If you don't, you will lose good people. At WIU, each board member serves as a liaison to a campus administrator, including vice presidents, deans, directors, or any department head to whom a link with the alumni association would be valuable. At each quarterly meeting, each liaison reports on events in his or her area of concern. In this way, our board members all have regular responsibilities and also provide high visibility for the alumni association within the university hierarchy. It took years for the program to evolve to its current state, and it requires constant vigilance to make sure it continues to function effectively.

It may be years before you can ensure a stream of highly qualified board members. The process takes time, and is a 365 days-a-year quest. Potential board members are found anywhere and everywhere. They can be alumni you already know; people you meet at alumni events; or referrals from faculty members, administrators, deans, and board members. Recruit members through your tabloid, newsletter, or magazine. Keep your eyes and ears open and establish a bank of desirable candidates to choose from when the time comes.

You will make good and bad choices. But make sure your most active members keep up the good work and encourage less active members to follow their example.

There is an important distinction between board membership and board leadership. Ideally, your board is a group of hard-working, committed, energetic people who enthusiastically support their alma mater. The board president should be all this and more. He or she needs to be articulate and intelligent with a professional demeanor. After all, the president represents the association at commencement and other high-visibility events and sets the tone in terms of appropriate behavior and expectations.

Examples of alumni association constitutions and bylaws can be found in Appendix III.

SETTING UP PROGRAMS

To find out what kind of programs your alumni might enjoy, organize focus groups, do phone interviews, do random mailings, or conduct surveys through your periodical. For more how-to advice on this subject, see CASE BOOKS' *Classic CURRENTS: Market Research*. It contains articles on planning and implementing surveys and on turning survey results into alumni programs.

Alumni who indicate interest in a specific activity on a survey don't necessarily attend the event. Keep your expectations realistic when you hold your event. If it works, great. If it doesn't, try something else. In one case, an alumni association allowed alumni to call in their credit card numbers for payment to an alumni dinner and attendance increased by 20 percent. In another case, a major reunion event was moved from the spring commencement weekend to a few weeks later. With parking and lodging space freed up, attendance went up!

Following are the pros and cons for events that might help develop a cohesive relationship between your alumni and their alma mater. Some will be meaningful to you; others won't fit your situation at all. Usually, only institutions with large staffs and vast financial resources are able to offer a totally diversified and broad-based program.

Regional events. Institutions with dispersed alumni need a way to get them together. One idea is a banquet with a cocktail hour, door-prize drawing, and a slide show followed by a question-and-answer period. The emphasis is best when it is on fun; you want alumni to come back next time. Since it's impossible for one person to work a room with 40 to 50 alumni, you'll want to recruit colleagues and local alumni to help.

If you are blessed with enough staff to support regional alumni clubs, many events can be handled by club leadership. (For more details on managing clubs, see the September 1992 CURRENTS.) Club leaders must meet deadlines and provide on-site support. Some institutions (Miami University of Oxford, Ohio; University of Florida; and Ohio State University, for example) have excellent club structures. Others opt for the less expensive "regional event" format.

Banquets involve considerable planning, so it's best to experiment with simple get-togethers and see how attendance goes, before you tackle something as elaborate as a banquet. And don't embark on an ambitious regional program unless you have lots of energy and love your work. However, such demanding endeavors can be beneficial for identifying and cultivating prospects, updating alumni files, and generating goodwill.

Alumni awards. Award programs provide an excellent venue for involving your alumni board in decision making. Coordinating awards procedures with colleges and departments is needed, especially if these groups are also recognizing alumni. Allow respective colleges to select the awards. For example, piggybacking on their choices for outstanding faculty member saves you time and keeps you out of campus politics. To prevent multiple awards given to the same people, agree on some sort of clearinghouse for establishing criteria and sharing information.

Following are possible awards:

- Alumni achievement awards in career, community, *and* university service;
- Alumni achievement in career, community, *or* university service;
- Honorary awards for nonalumni who have supported the institution or its alumni association;
- Service awards for contributions to the alumni association;
- Young alumni awards (for university or community service from alumni under 30 years of age);
- Faculty excellence awards for outstanding teaching or research; and
- Outstanding advisor awards.

Processes for nomination, qualification, selection, and notification should be in place before any awards are bestowed. Adequate lead time is critical. The awards may be presented to winners at dinners, special events, homecomings, or other festivities. Don't scrimp on plaques because honorees love to display them. When faculty are honored, you can bestow alumni association–financed stipends along with the plaques.

Scholarships. A scholarship program is an ideal way to demonstrate our commitment to academic excellence. In fact, it is practically a necessity. Such a program should have a solid foundation, accompanied by careful nurturing over time.

You can award scholarships on the basis of academic performance, need, student leadership, attaining geographic balance, being the son or daughter of an alumnus, or according to any criterion you deem appropriate. Don't offer more scholarships than you can afford. Raising scholarship money is a challenge. Methods include soliciting prospective donors; dipping into alumni dues; holding bake or plant sales; and placing surcharges on merchandise revenue, credit card use, or insurance royalties. Funds need to be sufficient to endow the scholarship or provide adequate annual support to ensure continued funding. Your student alumni council can also raise money for scholarships.

Community service. Serving the community is a can't-miss activity. It benefits everyone, and there is absolutely no excuse for not doing at least something. Possibilities include cleanup projects, campus beautification, health campaigns, and work with underprivileged youth.

At the University of Notre Dame, the institution's involvement in breast cancer research has mobilized alumni to support their alma mater in a cause in which they fervently believe. At WIU, the Flood, Sweat and Tears Cookout raised $10,000 in two days for the victims of the Midwest flood of 1993.

Legislative advocacy. Even if you are not a public institution, there are city, state, or federal issues that you may want to influence. The effectiveness of alumni association legislative advocacy varies according to the ability to organize an advocacy effort, the mix of presidential leadership, the strength of the alumni association, and the extent to which legislators welcome such initiatives. The alumni voice can raise the institution's visibility when lawmakers are considering college or university budget allocations, program development, or program elimination. But the key to success is the dedication and commitment of one person—a staff member or alumnus—to the responsibility for putting forward a stellar effort. This person should then be able to call on the alumni association itself, the president of the institution, a member of the advancement staff, or all of the above to handle the details.

If your college or university president is a good lobbyist, this may be all you need. On the other hand, lobbying can also be done through a comprehensive county-by-county network of working alumni. You can mount a tandem effort in which the institution's designated lobbyist organizes an advocacy program with assistance from the alumni association to identify prospective supporters. The University of Minnesota alumni association has a highly respected legislative advocacy program. It is well-organized, has a defined mission, and can react quickly as needed. The value of an advocacy program is undeniable as long as it doesn't detract from more pressing concerns.

Alumni day. It is always nice to get alumni back to campus to honor them, thank them, and let them share life experiences with students. It's a time for bragging, showing off our best alumni, generating positive publicity about our graduates, and impressing the student body.

Unlike other activities, an alumni day forces you to cross academic department lines. Coordination is vital. Questions you should address include

- Who will pay alumni expenses (e.g., travel, lodging, meals, mementos)?
- Who will work together to choose a mutually agreeable date?
- How will alumni be introduced and recognized?
- What will alumni do when not making their presentations?
- Will you hold a dinner in their honor?

Regardless of how you accomplish it, getting alumni together at their alma mater is a winning idea. Such a gathering will probably eventually pay for itself in revenue and overall goodwill.

Constituency-based reunions. In the foreword to this book, Bill Evitts discusses changes in today's college scene, including the increasingly diverse nature of the student body and student interests. This climate makes it difficult to attract alumni to general, all-inclusive programs. Other reasons for a decline in all-inclusive programs are 1) large student enrollments make it difficult to know everyone on campus, 2) alumni identify more with subgroups (i.e., teams, clubs, fraternities and sororities) than the institution as a whole, and 3) as alumni advance in their careers, they build more ties with their profession and major course of study.

We need new ways to attract our alumni. Constituency-based reunions are on the cutting edge of what is happening in our profession. We are all members of some constituency. Perhaps we belonged to a fraternity, lived in the same residence hall, or played on the same intercollegiate team or marching band. However, abandoning traditional gatherings for constituency-based reunions is difficult because many of us do not have the staff or budget resources to devote to such activities.

If you want to pursue constituency reunions, however, you will need to identify your alumni's strongest affiliations without jeopardizing other useful programs. In addition to class reunions, for example, you can hold a dinner for minority alumni or an all-Greek picnic, implementing them as demand, time, and resources permit. (See the April 1997 CURRENTS article on ideas for programs for older, nontraditional alumni, and the March 1995 issue for an article about special-interest alumni groups.)

Admissions recruitment outreach. The alumni association–admissions office relationship can be as extensive and comprehensive as both parties desire. The level of involvement is affected by institutional philosophy, enrollment issues, and the desire of the admissions staff for alumni assistance.

An admissions outreach program can involve both the alumni board and association members at large. It can boost applications for admission to the institution, and develop relationships between the alumni and admissions offices. Once again, the trade-off depends on the time and resources such an effort diverts from other activities.

Alumni can help recruitment efforts in the following ways:

- Write or telephone accepted candidates.
- Assist admissions staff at college nights.
- Visit or interview applicants personally.
- Meet with prospective students during their campus visits.

Creating new career opportunities. Gone are the days when a graduate could land a job and remain there for 35 to 40 years. Today's graduates will probably work for several companies and pursue a range of careers before retirement. Many are already looking to alumni associations for assistance in finding new jobs and upgrading work skills.

If your alumni association, in possible sponsorship with your institution, can offer cutting-edge classes in technology or other topics popular today, you might find an audience for such classes among your alumni body.

Career networking programs are available—usually for a fee—that purport to match alumni to potential job offerings. Beware of programs that sound good but fail to deliver legitimate job leads. Contact other colleges and universities with such placement agencies and see how they are doing. (See the January 1996 CURRENTS article on setting up career services for alumni and the August 1992 issue on electronic career services.) We have struggled at WIU in our career network attempts. We have not been impressed by the outreach services you pay for, and our internal efforts have not been particularly successful either. This does not mean such programs are unimportant, but rather that you need to find a mechanism that works at your institution.

Student alumni council. While they are still on campus, educate students about the values of alumni association membership. Student alumni can help at homecoming and staff phonathons, serve as tour guides for alumni and prospective students, raise money for scholarships, and assist the athletic department in promoting school spirit.

A student alumni council can be self-supporting and be as productive as itsmembership and leadership allow. Each year our council raises money with a finals-week survival program that gives parents the opportunity to give their son or daughter a sack of goodies and an encouraging note at the beginning of finals week. They also attended a Student Alumni Association/Student Foundation (SAA/SF) conference and brought back Clemson University's idea for painting paw prints on university streets. This dovetailed perfectly with our bulldog mascot. Every year our student alumni council sponsors a dinner to promote the university to worthy high school students. It is a great recruitment tool. Upon graduation, former student alumni council members can become a valuable source of trained, educated alumni board members.

Some institutions, like Indiana University, allow all interested students to become members. Others restrict membership. Two notes of caution: first, a student alumni council needs money to operate; ours costs about $5,000 a year, which students raise by selling finals-week survival kits. Second, the council should follow the structure of your alumni board: a mission statement, constitution, and goals. Do not allow it to stagnate; otherwise, it will be a drain on your resources and members will lose interest quickly. (For more ideas on getting students involved in alumni affairs, see the October 1994 CURRENTS.)

Homecoming. Almost every school has some type of homecoming activity; it is usually centered around a football or basketball game along with entertainment. The festivities provide an ideal way to offer alumni a nostalgic link to their alma mater even as they look to the future. But homecoming is not just about alumni; it's also about the students. Build a bridge to your student affairs professionals, who generally are very involved in homecoming planning with your current student body. (For more information on homecoming planning, see the September 1993 CURRENTS; an article on events software appears in the January 1995 issue.)

World Wide Web. Communicating electronically can only grow in the years ahead. It's how young alumni, in particular, communicate with one another. Assuming you have the technology and equipment, you can design a home page on the Web that discusses your program, provides pertinent dates, publishes excerpts from your publication, and adds any other information you want to publicize—all for little cost.

Services and merchandise. To generate revenue and school spirit, many alumni associations offer directories, insurance policies, affinity credit cards, diploma frames, rings, job referral services, and other products and services. Don't get burned by being overzealous marketers who can alienate alumni by constantly telemarketing to them. Supplement telemarketing with mail marketing whenever possible.

A LOOK AHEAD

Alumni relations can be exciting, challenging, fascinating, and worthwhile. The job is also draining and at times frustrating. A combination of your own attributes and your institutional environment will determine your level of satisfaction and success as an alumni professional. The best advice is to define your goals, decide on a plan of action, gather support, and get started. Good luck!

APPENDIX I

MISSION STATEMENTS
STRATEGIC AND LONG-RANGE PLANS
GOALS AND OBJECTIVES

Ashland University
Clarke College
Clemson University
Columbus State Community College
Drew University
Illinois State University
Indiana University-Purdue University at Fort Wayne
Kansas State University
Kent State University
Loyola University, New Orleans
Marquette University
Millersville University
Missouri School of Mines-University of Missouri/ Rolla
New Mexico Highlands University
Old Dominion University
Plymouth State College
Tulane University
University of California at Berkeley College of Engineering
University of Indianapolis
University of Maine
University of Michigan-Dearborn
University of Saskatchewan
University of Texas at Dallas
United States InternationalUniversity/California Western University
Virginia Randolph Ellett School
Viterbo College

Colorado College
Oberlin College
Western Illinois University

EXCERPTS FROM MISSION STATEMENTS

Ashland University

The mission of the Ashland University Alumni Association is to provide a liaison between the alumni of Ashland University and its trustees, administration, staff, faculty, students, and friends.

It shall be the purpose of the AUAA to:

- Keep Alumni Conversant with the programs and activities of the University;
- Provide financial support to the University and its programs;
- Develop alumni programs that foster fellowship among alumni and encourage the physical, moral, and spiritual growth of the University; and,
- Assist the University in the growth of its academic, administrative, cultural, and extracurricular activities.

Clarke College

The Clarke College Alumni Board is dedicated to actively serving the Clarke Community by: embracing the mission and engaging in the ministry of the college; fostering intellectual, spiritual and emotional ties among the members of the Clarke family; nurturing mutually beneficial relationships; enhancing communication between and among the College community, alumni and friends. Therefore the intent of this partnership is to ensure the continuity of our common spirit and the mission of Clarke College.

Clemson University

To Serve, To Involve & To Inform

Columbus State Community College

To develop and foster a mutually beneficial relationship between the college and its alumni. We will accomplish this by providing educational opportunities, social programs, services, and benefits to meet the diverse interests of the college and the membership.

Drew University

To support the University in its pursuit of excellence in teaching, research and public service; develop strong bonds of loyalty between alumni/ae and the University; promote the stature of Drew University; and, encourage lifelong learning.

Illinois State University

Alumni Services Mission Statement: To serve Illinois State University alumni and students in order to strengthen connections and encourage involvement with the institution. The following values will guide our work: Quality, Service, Pride, Professionalism, Relationships, Traditions, and Diversity.

Alumni Association Mission Statement: (This statement has been developed by the Association's Board Development Committee and approved to present to the Association for adoption by its Executive Committee and Board of Directors. It will be voted on September 12, 1998.)

The mission of the Illinois State University Alumni Association is to support the University through the knowledge, skills, financial resources, and loyalty of its alumni; to communicate and interpret the University's goals and achievements to others; and to promote a spirit of unity and loyalty among former students and friends.

Motto: To serve, to advise, to advocate, to strengthen.

Indiana University-Purdue University at Fort Wayne

The IPFW Alumni Association exists to actively support IPFW and its alumni through meaningful and appropriate service.

Kansas State University

The purpose of the Kansas State University Alumni Association is to provide a two-way communication link between the University, its alumni and friends. Association programs keep K-Staters informed about and interested in the continued development of Kansas State University. The effect of these programs is to strengthen the University so it can continue to fulfill and expand its mission of teaching, research and service.

Association Goals

1. Maintain, update and manage the Alumni Records database and provide access and service to all University users.
2. Maintain an effective administrative program and sound financial operation.
3. Develop and maintain a marketing plan for a strong membership program, the Tradition Founders and other service oriented income areas.
4. Inform alumni and friends about the University and the Association through a comprehensive communications program.
5. Build and maintain strong relationships between the University, alumni, friends and students.
6. Assist the University with the student recruitment effort.

Kent State University

The Kent State University Alumni Association, as the only enduring and permanent constituency of Kent State University, endeavors to increase the level of communication and promote positive lifelong relationships between Kent alumni and their alma mater. The Kent State University Alumni Association exists as an incorporated non-profit organization designed to serve the needs and represent the interests of graduates, former students, and friends of Kent State University and to partner with the University in supporting its mission and goals.

Loyola University New Orleans

The objects and purposes of this association are: to foster a spirit of union between the members of the alumni and thus carry into their fields of endeavor a spirit of cooperation and fellowship; to establish and maintain an effective relationship between the university and its alumni; to provide a vigorous body for sustaining and promoting the growth, development, and welfare of the University; and to cooperate in every reasonable way in the work of the University and the activities of its student body.

Marquette University

Our mission is to help Marquette University, as an urban, Catholic, Jesuit institution, become one of the nation's distinguished universities; and, to this end, we strive to bring all alumni closer to the University and one another in the Ignatian tradition of care for each person.

Millersville University

Out of gratitude for the education received at Millersville University and a belief in the value of public higher education, the Alumni Association is committed to continuous improvement of the educational process through its support to the University. The Association promotes a meaningful dialogue and exchange of ideas between the University and its alumni. And, through the diverse programs of volunteer services and financial assistance, the Association is committed to strengthening alumni relations in support of the University's mission. These include providing information about the University to alumni, encouraging and supporting Millersville's educational relationship with alumni, sponsoring a variety of activities of interest to alumni and providing alumni with opportunities for service to the University.

Strategic Directions: The Board of Directors, the governing body of the Alumni Association, will focus its committee activities on the following strategies: Academic Enrichment, Student Enrichment, Alumni Enrichment and Community Relations.

Missouri School of Mines-Uiversity of Missouri/Rolla

The association will proactively strive to create an environment embodying communication with and participation by MSM-UMR Alumni Association and friends to foster strong loyalty to UMR and growth of the association. The association will increase its financial strength as well as provide aid and support to deserving students and appropriate projects.

New Mexico Highlands University

The mission of the New Mexico Highlands University Alumni Association shall be to advance New Mexico Highlands University through building loyalty, fellowship and commitment among its members.

Our Goals:

To strengthen bonds and build relationships between alumni, students, and the New Mexico Highlands University Community.

To inform our alumni and friends of the progress, achievements and needs of the University and provide opportunities for them to contribute to its welfare.

To dedicate our efforts and services to involve alumni, students, parents, friends, faculty and staff in the activities of the University.

Old Dominion University

The Alumni Program is committed to its mission statement: To promote the well being of Old Dominion University through leadership and service by reinforcing the importance of partnership with the University while enhancing the intellectual and emotional ties amongst alumni, faculty, staff, parents, students and friends of the University.

The Vision Statement of the Alumni Program guides all actions associated with this plan. It reads as follows: It is our vision that the Old Dominion University Alumni Program be held in high esteem by the alumni, the University's administration, the faculty and Board of Visitors and be recognized by our peers as the premier alumni program in the state of Virginia as well as one that is highly regarded nationally. It is our vision that this excellence will be earned through the success of our programs in helping to promote a stronger, nationally recognized University.

Plymouth State College

To unite the members to strengthen interest in and support of Plymouth State College.

Tulane University

The Tulane Alumni Association, a vital member of the university community, is dedicated to advancing Tulane's pursuit of its highest potential. The Association provides a forum for meaningful involvement and interaction among alumni, students and university leaders.

University of California at Berkeley College of Engineering

To build a loyal alumni base and foster support for the College of Engineering by providing services and benefits to alumni and students. . .

To advance the service and art of engineering, to promote the general welfare of the College of Engineering of the University of California at Berkeley, and to encourage and stimulate the interest of students, graduates, and others in the College of Engineering.

University of Indianapolis

The mission of the University of Indianapolis Alumni Association is to support the University as it seeks to attain its ideals; communicate and interpret the University's goals and achievements to others; and promote a spirit of unity and loyalty among graduates, former students and friends.

University of Maine

It is the mission of the General Alumni Association of the University of Maine to promote excellence at the University of Maine by fostering productive relationships among, providing service and support to, and serving as an advocate for the University of Maine and its alumni.

University of Michigan-Dearborn

The Alumni Affiliate is an organization of alumni advocates who seek to enhance the liberal arts experience for students of the College of Arts, Sciences and Letters and to promote the continued growth and development of its graduates. The unification of alumni, staff and students is a priority. The following points embody the purpose of the Affiliate:

1. Stimulate interest and involvement in the College of Arts, Sciences and Letters of the University of Michigan-Dearborn.
2. Provide its membership with opportunities for professional development and networking.
3. Encourage outstanding liberal arts student candidates to select the University of Michigan-Dearborn.
4. Familiarize its membership with the progress and challenges of the College of Arts, Sciences and Letters and the University of Michigan-Dearborn.
5. Collaborate with University officials in addressing the needs, policies and programs of the College of Arts, Sciences and Letters and the University of Michigan Alumni Association.

6. Develop communication and cooperation among faculty, alumni, students and friends of the College of Arts, Sciences and Letters.
7. Create a favorable environment for successful fund raising efforts by the College of Arts, Sciences and Letters.

University of Saskatchewan

As the official body representing all University of Saskatchewan alumni, and building on the proud history and tradition of the University, we encourage and foster lifelong involvement of the alumni with the University and its development through advocacy, support, service and communications.

University of Texas at Dallas

The Alumni Association's goal is to praise and promote The University of Texas at Dallas and its students, and to unite, inform and involve alumni and friends in fellowship and support of education.

United States International University/ California Western University

The USIU/Cal Western Alumni Association's mission is to promote the general welfare of the University, to foster the interest and involvement of alumni and friends in the activities of the University, and to establish programs through which the alumni and friends of the University, working with the administration, can support and advance the University's commitment to excellence in preparing students to contribute effectively and ethically as citizens of a changing and increasingly technological world.

The mission will be achieved through cooperative programs which will result in the following outcomes:

- Implementation of communication processes to encourage the cooperation and involvement of alumni and friends.
- Provision of financial support to the University.
- Participation in the development and refinement of the educational programs.
- Participation in and support of recruitment and other student activities.
- Establishment of a worldwide alumni network.
- Fostering of fellowship through a variety of alumni-sponsored events.

Virginia Randolph Ellett School

The purpose of the Association shall be to maintain and advance the interests of The Virginia Randolph Ellett School and its successor, St. Catherine's School, to strengthen relations between St. Catherine's and the alumnae, and to promote and foster the spirit of service and fellowship among members through various volunteer activities and committee work.

Viterbo College

The mission of the Board shall be to promote the participation and involvement of the Association's members through activities that support and enhance the educational growth and financial stability of Viterbo College.

The purpose of this organization shall be to:

- support academic growth and facilities development at Viterbo
- promote a greater public awareness of the college and its mission
- contribute to the financial stability of the college
- foster lifetime involvement and commitment to the college
- offer spiritual and social opportunities among the members to further individual growth and community spirit

Western Illinois University

The Alumni Association, through communication, commitment, programs, advocacy, and leadership, shall continue with pride the lifelong relationship of our graduates with the premier undergraduate teaching institution in the state of Illinois.

SAMPLE MISSION STATEMENT

COLORADO COLLEGE

Alumni Association Mission and Goals

Mission: The purposes of The Colorado College Alumni Association shall be to advance the general interests of The Colorado College and its alumni; to promote the College as a liberal arts college of excellence and national distinction; and to promote the participation of alumni in the College's affairs.

Goals:

- Support the college through involvement and participation in alumni activities Includes all aspects of Alumni pOrograms, student recruiting, career advice and referral, fundraising, campus events and meetings, metro area activities, involvement with faculty and students

- Provide opportunities for alumni to associate with each other Results from all Alumni organization efforts, on campus and off campus meetings and activities

- Facilitate communications between alumni, the National Alumni Council and the College Occurs in may ways including the *Bulletin*, President's Report, Class Agent letters, Annual Fund material, mailers about campus events and area events, correspondence, Alumni Surveys, Alumni Forum and Alumni representation of the Board of Trustees

- Broaden alumni understanding of the college and its role in higher education Such awareness should result from all of the communications listed above and froman awareness developed with Colorado College alumni about general issues and trends in higher education

- Promote understanding and participation of alumni and friends in support ofthe financial needs of the College Results from overall efforts of College Relations and Development programs

- Nominate qualified candidates to serve as Alumni Trustees Responsibility of National Alumni council Nominating Committee

- Provide opportunities for leadership and participation within the Alumni Association and college-related activities Provided through Metro Area committees and coordinating councils, the alumni Admission Representative a[illegible] Career Referral Programs, Development volunteers, National Alumni council committee opportunities

- Assist and support the College in its commitment to the achievement of cultural diversity within the college community Alumni efforts in student recruitment activities promote this ideal

Continues

SAMPLE MISSION STATEMENT

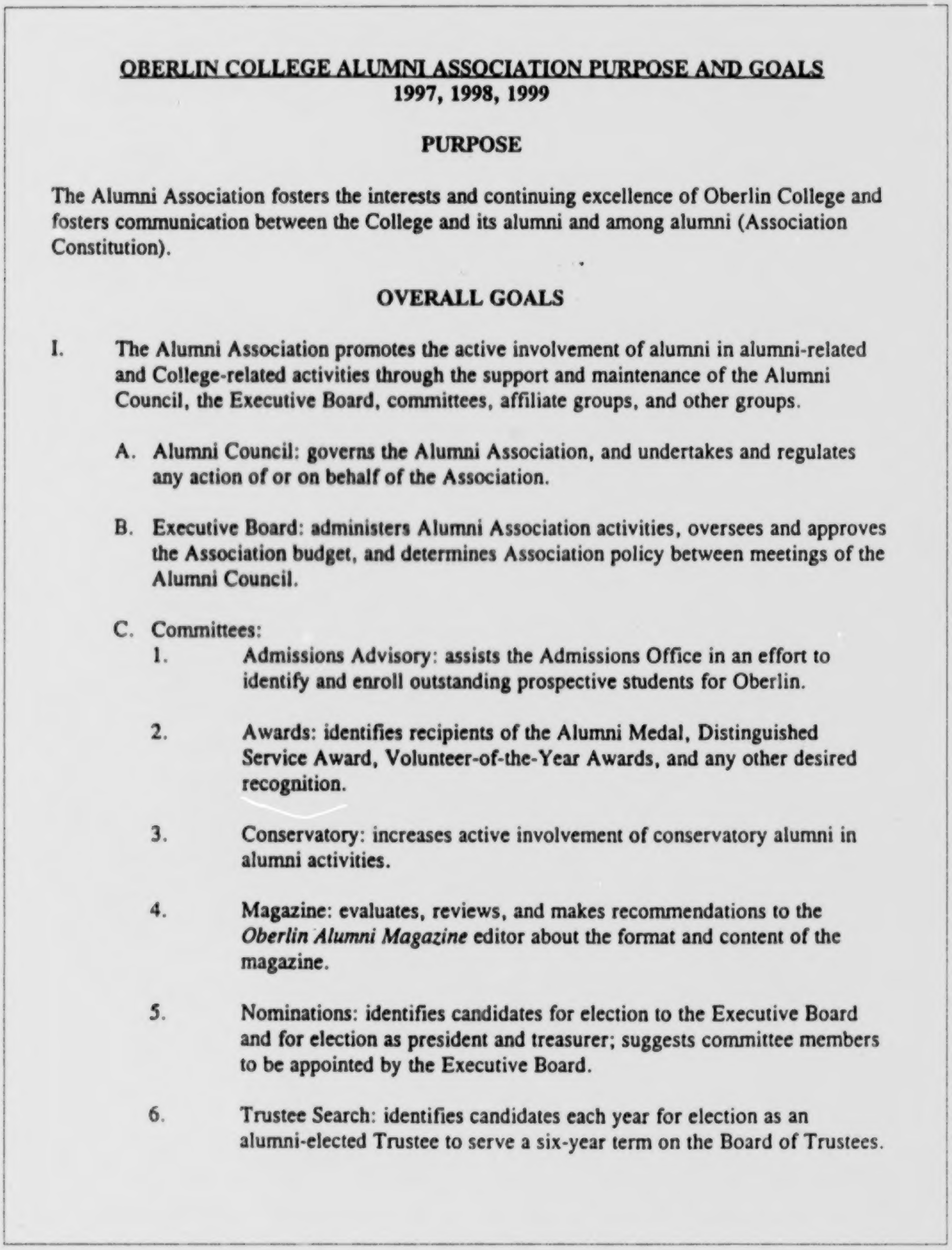
COLORADO COLLEGE

- Assist the college with identification and recruitment of students. Occurs through Alumni Admission Representative program.
- Build an understanding among current students of the role of the alumni in the life of the College. Developed through the S/AA, activities with each graduating class and activities to develop class identity and leadership involvement with other classes; student participation in development activities; alumni accomplishment as exemplified by Alumni Honorary Degree program.
- Provide opportunities for intellectual enrichment through the college's academic and alumni community. Faculty seminars and other programs both on campus and in other areas of the country.

5/1/97
word/nac/general alumni association goals

SAMPLE MISSION STATEMENT

OBERLIN COLLEGE



OBERLIN COLLEGE ALUMNI ASSOCIATION PURPOSE AND GOALS

1997, 1998, 1999

PURPOSE

The Alumni Association fosters the interests and continuing excellence of Oberlin College and fosters communication between the College and its alumni and among alumni (Association Constitution).

OVERALL GOALS

I. The Alumni Association promotes the active involvement of alumni in alumni-related and College-related activities through the support and maintenance of the Alumni Council, the Executive Board, committees, affiliate groups, and other groups.

  A. Alumni Council: governs the Alumni Association, and undertakes and regulates any action of or on behalf of the Association.

  B. Executive Board: administers Alumni Association activities, oversees and approves the Association budget, and determines Association policy between meetings of the Alumni Council.

  C. Committees:
    1. Admissions Advisory: assists the Admissions Office in an effort to identify and enroll outstanding prospective students for Oberlin.

    2. Awards: identifies recipients of the Alumni Medal, Distinguished Service Award, Volunteer-of-the-Year Awards, and any other desired recognition.

    3. Conservatory: increases active involvement of conservatory alumni in alumni activities.

    4. Magazine: evaluates, reviews, and makes recommendations to the *Oberlin Alumni Magazine* editor about the format and content of the magazine.

    5. Nominations: identifies candidates for election to the Executive Board and for election as president and treasurer; suggests committee members to be appointed by the Executive Board.

    6. Trustee Search: identifies candidates each year for election as an alumni-elected Trustee to serve a six-year term on the Board of Trustees.

Continues

SAMPLE MISSION STATEMENT

OBERLIN COLLEGE

D. Affiliate Groups:

1. Alumni and Disabilities: Overcoming Barriers in the Environment (ADOBIE): increases active involvement of disabled alumni in alumni activities.

2. Oberlin African-American Alumni/ae Association (OAAAA): increases active involvement of African-American alumni in alumni activities.

3. Oberlin Asian Pacific American Alumni/ae Association (OAPAAA): increases active involvement of Asian Pacific alumni in alumni activities.

4. Oberlin College Alumni Bowlers Association (OCABA): increases active involvement of bowling alumni in alumni activities.

5. Oberlin International Alumni Association (OIAA): increases active involvement of international alumni in alumni activities.

6. Oberlin Lambda Alumni (OLA): increases active involvement of lesbian, gay, and bisexual alumni in alumni activities.

7. Oberlin Latino Alumni Association (OLAA): increases active involvement of Latino alumni in alumni activities.

E. Other Groups:

1. The John W. Heisman Club: increases active involvement of athletes in alumni activities.

II. The Alumni Association supports the distinctive elements of Oberlin's mission: intellectual seriousness and academic excellence and rigor; artistic excellence and vibrancy of the arts community; an education in social engagement; and commitment to educational access and social diversity.

SPECIFIC PROGRAM GOALS

I. Alumni Council Weekend: Plan and implement the annual Alumni Council weekend, in coordination with the Admissions and Development offices.

A. Determine weekend theme in conjunction with Executive Board and Oberlin College president.

B. Communicate "state of the College" to alumni through sessions presented by the president, students, faculty, and administrators.

Continues

SAMPLE MISSION STATEMENT

OBERLIN COLLEGE

  C. Hold orientation sessions for new admissions coordinators, class/cluster agents, class presidents, committee members, and regional coordinators.

  D. Hold separate work and informational sessions for admissions coordinators, class agents, class presidents and regional coordinators.

  E. Plan and implement meetings of Executive Board, Admissions Advisory, Awards, Conservatory, Magazine, Nominations, and Trustee Search Committees.

  F. Hold reunion planning meetings for classes celebrating reunions during the next year's Memorial Day weekend.

II. Class/Cluster Reunions: Conduct class/cluster reunions each May to increase participation, class spirit, and class identity.

  A. Assure that each reunion class receives a series of letters over the months leading up to reunion weekend.

  B. Encourage the use of mini-reunions, telephone trees, and personal contact to increase reunion participation.

  C. Coordinate compilation, publication, and distribution of reunion class directories.

  D. Assure that each class has a banner for display during reunion weekend.

  E. Increase interaction between alumni and faculty/staff during reunions by holding at least one program depicting present College programs as part of the weekend activities.

III. Class Presidents: Assure that each alumni class has an active class president.

  A. Hold class elections during the junior and senior years, and before each reunion. The elected representatives become class officers.

  B. Aim for 100% participation from class presidents or designees each year at Alumni Council weekend.

  C. Schedule a forum at Alumni Council weekend whereby class presidents can exchange ideas on pertinent topics.

  D. Orient new class presidents during Alumni Council weekend through presentations outlining duties of the office.

Continues

SAMPLE MISSION STATEMENT

OBERLIN COLLEGE

E. Promote communication with classmates through class presidents' letters based class letter guidelines.

F. Evaluate annually the performance of each class president, commissioning the Alumni Association President and the Executive Director to replace those who ar inactive.

IV. Regional Activities: Promote regional alumni activities in the United States and abro

A. Establish volunteer alumni representation in targeted areas, Cleveland and Northern New Jersey. Provide on-going support to regional coordinators and steering committees.

B. Introduce "yearly planning" with and for the leaders of regional activities for area ready for this level of structure, targeting NYC, Seattle, and San Francisco.

C. Coordinate with the Dean of the College and the Admissions staff faculty visits t regional alumni groups. Coordinate house concerts with the Conservatory. Devi an effective way to monitor and capitalize on faculty travel plans.

D. Foster exchange of ideas with and among regional coordinators by conducting workshops during Alumni Council weekend and through regular communication during the year. Mail copies of regional activity flyers to all coordinators. Aim for 100% participation of coordinators or designees each year at the Council weekend.

E. Continue to coordinate Community Service Days with regional groups.

F. Communicate with self-defined groups to coordinate regional activities in targeted areas.

V. Special Interest Group Reunions/Conferences: Plan and implement at least two special interest group reunions/conferences each year to increase alumni visits to campus.

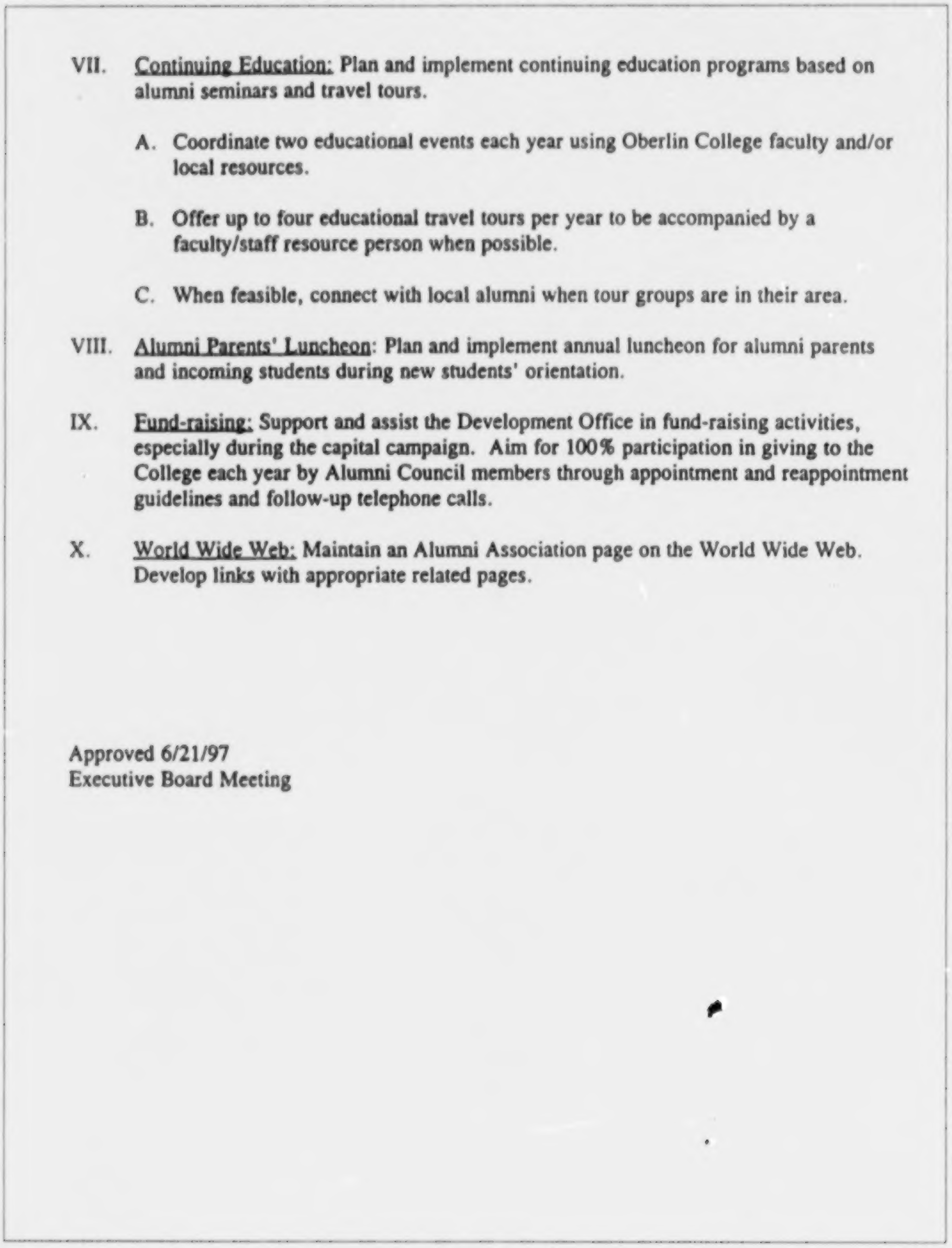
A. Assist students/faculty to coordinate reunion/conferences.

B. Assist students/faculty with special projects; i.e., Politics Symposium, Environmental Studies Center Ground-breaking, Peters Hall Dedication.

VI. ASOC (Alumni in Service to Oberlin College): Encourage broad representation of cultural diversity, women, and science alumni participation when coordinating this program with faculty.

Continues

SAMPLE MISSION STATEMENT
OBERLIN COLLEGE



VII. Continuing Education: Plan and implement continuing education programs based on alumni seminars and travel tours.

- A. Coordinate two educational events each year using Oberlin College faculty and/or local resources.
- B. Offer up to four educational travel tours per year to be accompanied by a faculty/staff resource person when possible.
- C. When feasible, connect with local alumni when tour groups are in their area.

VIII. Alumni Parents' Luncheon: Plan and implement annual luncheon for alumni parents and incoming students during new students' orientation.

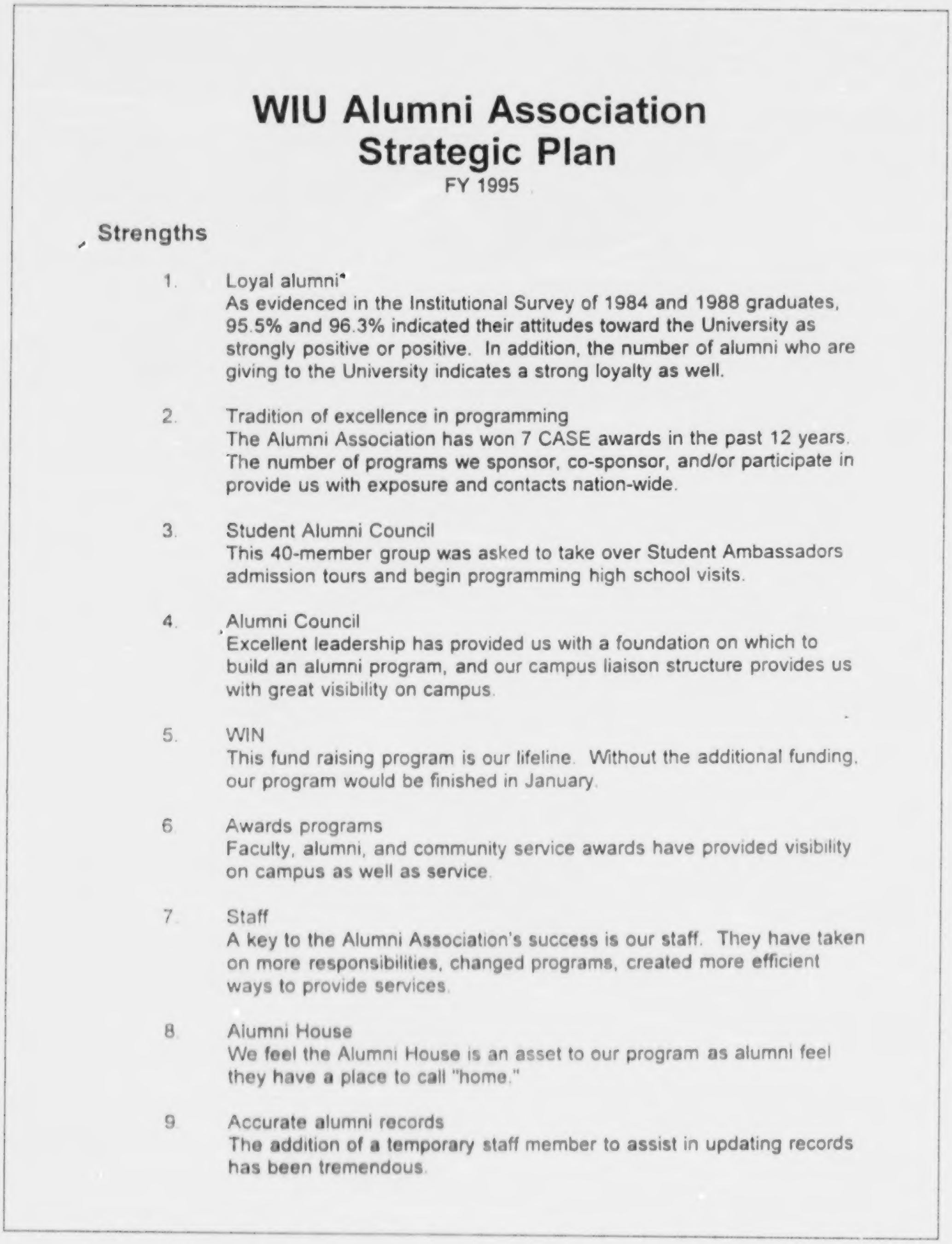
IX. Fund-raising: Support and assist the Development Office in fund-raising activities, especially during the capital campaign. Aim for 100% participation in giving to the College each year by Alumni Council members through appointment and reappointment guidelines and follow-up telephone calls.

X. World Wide Web: Maintain an Alumni Association page on the World Wide Web. Develop links with appropriate related pages.

Approved 6/21/97
Executive Board Meeting

SAMPLE STRATEGIC PLAN

WESTERN ILLINOIS UNIVERSITY



WIU Alumni Association Strategic Plan

FY 1995

Strengths

1. Loyal alumni
As evidenced in the Institutional Survey of 1984 and 1988 graduates, 95.5% and 96.3% indicated their attitudes toward the University as strongly positive or positive. In addition, the number of alumni who are giving to the University indicates a strong loyalty as well.

2. Tradition of excellence in programming
The Alumni Association has won 7 CASE awards in the past 12 years. The number of programs we sponsor, co-sponsor, and/or participate in provide us with exposure and contacts nation-wide.

3. Student Alumni Council
This 40-member group was asked to take over Student Ambassadors admission tours and begin programming high school visits.

4. Alumni Council
Excellent leadership has provided us with a foundation on which to build an alumni program, and our campus liaison structure provides us with great visibility on campus.

5. WIN
This fund raising program is our lifeline. Without the additional funding, our program would be finished in January.

6. Awards programs
Faculty, alumni, and community service awards have provided visibility on campus as well as service.

7. Staff
A key to the Alumni Association's success is our staff. They have taken on more responsibilities, changed programs, created more efficient ways to provide services.

8. Alumni House
We feel the Alumni House is an asset to our program as alumni feel they have a place to call "home."

9. Accurate alumni records
The addition of a temporary staff member to assist in updating records has been tremendous.

Continues

SAMPLE STRATEGIC PLAN

WESTERN ILLINOIS UNIVERSITY

10. *Western News* content
The *Western News* is a major communication piece for alumni and friends of Western Illinois University, yet costs only a few cents to print.

11. Relationship with development and administration
The Alumni Association is fortunate to have an excellent long-standing working relationship with the Development staff and other adminstrators on campus.

Weaknesses

1. Technology
The current records system needs more space for telephone extension numbers, fax numbers, e-mail addresses, activity codes, as well as better sorting and addressing capabilities. Due to the Alumni Association's location, we do not have easy access to the campus network or Internet.

2. Minimal programming in continuing education
Continuing education is a natural program for the Alumni Association to offer, yet we haven't done much in that area.

3. Networking for alumni
Due to the Rights and Privacy Act, we do not currently distribute comprehensive lists of alumni living in specific areas or working for certain companies. We recognize a need to provide alumni an opportunity to network, yet are concerned about how to manage such a program.

4. Minimal career programs
Another area of interest to alumni continues to be in the area of careers. Other than a career workshop to be held in April, we have left that responsibility with the placement office.

5. WIN
While WIN is our lifeline, it is also a time-consuming project.

6. *Western News*
While the content is a strength, the quality of paper and the absence of color are weaknesses.

Opportunities

1. CAMP-WIU
The Career Alumni Mentor Program will provide more opportunities for alumni to interact with students.

Continues

SAMPLE STRATEGIC PLAN

WESTERN ILLINOIS UNIVERSITY

2. Alumni directory
   The directory would assist in updating our records and helping alumni network.

3. Technology
   Technology (i.e. Internet) will provide new, easier ways to reach individuals (i.e. international alumni) we may not otherwise reach.

4. Alumni Admissions programs
   The takeover of the student ambassadors by the Student Alumni Council and the addition of admissions receptions to our alumni events will assist in further solidifying the relationship between alumni and admissions.

5. On-site alumni events at schools/corporations
   Providing easy access to events will increase our contacts with alumni and WIU's visibility at various corporations.

6. Athletic co-sponsorship

7. Centennial celebration
   This event will provide a unique programming opportunity for the Alumni Association.

Threats

1. Inadequate resources
   Funding and staffing are two primary concerns. Postage and printing costs continue to rise and when those issues are coupled with the addition of thousands of "members" to the Alumni Association annually, our concerns become threats.

   Staffing is an issue as well. While we wouldn't expect the admissions staff or the faculty to work with 2000 more people annually with no additional help, the Alumni Association has been doing just that. We will not be able to add programs without additional staff.

2. Technology
   While advances in technology are exciting, maintaining the privacy of our alumni files is a concern.

4. Costs of premiums/t-shirts/travel

5. Mobility of graduates
   We can't stop our alumni from moving but it we will need to address how we are going to handle the workload.

Continues

SAMPLE STRATEGIC PLAN

WESTERN ILLINOIS UNIVERSITY

6. Alumni House condition
   The Alumni House is old and must be handled with care. Heating, cooling, and water leaks are a problem.

7. Postal Regulations
   Address requirements implemented by the Post Office continue to have an effect on our updating procedures and volume. Non-profit rates are of key concern as well.

8. Changing complexion of alumni

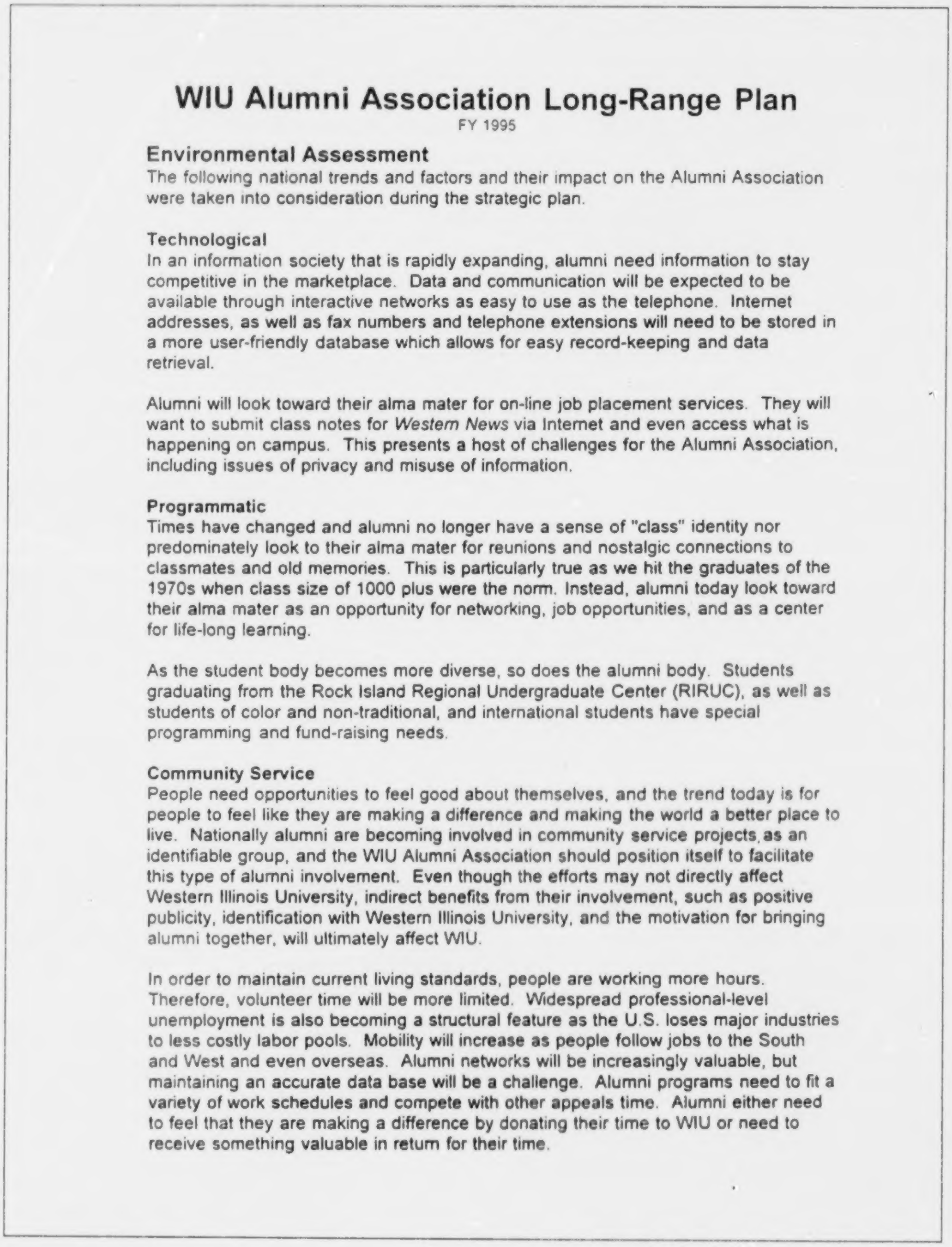
9. RIRUC graduates
   How we incorporate RIRUC alumni into our program and/or provide special programs for those invididuals will be an issue.

10. Student Alumni Council funding
    Student Alumni Council has generated its own budget since 1983, yet this year felt a significant crunch as they were one of three companies offering a finals week package.

11. Decentralization of alumni
    As more and more colleges and departments provide alumni events, newsletters, and services to their alumni, the overall Alumni Association will need to refocus its energy.

SAMPLE LONG-RANGE PLAN

WESTERN ILLINOIS UNIVERSITY



WIU Alumni Association Long-Range Plan

FY 1995

Environmental Assessment

The following national trends and factors and their impact on the Alumni Association were taken into consideration during the strategic plan.

Technological

In an information society that is rapidly expanding, alumni need information to stay competitive in the marketplace. Data and communication will be expected to be available through interactive networks as easy to use as the telephone. Internet addresses, as well as fax numbers and telephone extensions will need to be stored in a more user-friendly database which allows for easy record-keeping and data retrieval.

Alumni will look toward their alma mater for on-line job placement services. They will want to submit class notes for *Western News* via Internet and even access what is happening on campus. This presents a host of challenges for the Alumni Association, including issues of privacy and misuse of information.

Programmatic

Times have changed and alumni no longer have a sense of "class" identity nor predominately look to their alma mater for reunions and nostalgic connections to classmates and old memories. This is particularly true as we hit the graduates of the 1970s when class size of 1000 plus were the norm. Instead, alumni today look toward their alma mater as an opportunity for networking, job opportunities, and as a center for life-long learning.

As the student body becomes more diverse, so does the alumni body. Students graduating from the Rock Island Regional Undergraduate Center (RIRUC), as well as students of color and non-traditional, and international students have special programming and fund-raising needs.

Community Service

People need opportunities to feel good about themselves, and the trend today is for people to feel like they are making a difference and making the world a better place to live. Nationally alumni are becoming involved in community service projects as an identifiable group, and the WIU Alumni Association should position itself to facilitate this type of alumni involvement. Even though the efforts may not directly affect Western Illinois University, indirect benefits from their involvement, such as positive publicity, identification with Western Illinois University, and the motivation for bringing alumni together, will ultimately affect WIU.

In order to maintain current living standards, people are working more hours. Therefore, volunteer time will be more limited. Widespread professional-level unemployment is also becoming a structural feature as the U.S. loses major industries to less costly labor pools. Mobility will increase as people follow jobs to the South and West and even overseas. Alumni networks will be increasingly valuable, but maintaining an accurate data base will be a challenge. Alumni programs need to fit a variety of work schedules and compete with other appeals time. Alumni either need to feel that they are making a difference by donating their time to WIU or need to receive something valuable in return for their time.

Continues

Financial
Resources for Western Illinois University will continue to be limited as state support remains austere and tuition increases are unable to close the gap. As a result of the current national economic climate, private support through corporate matching gift programs will be reduced, and grants from foundations and corporations will continue to be very competitive. The Association needs to continue its assistance to the Foundation by supporting efforts to increase alumni participation in the annual fund, increase the average gift, and secure major alumni gifts.

Internal Environment

Identity and Connections
Within the last 95 years, the University has experienced changes in name and size of the campus. Depending on the decade, alumni graduating from the same institution know it by various names including Western Illinois Normal School, Western Illinois State Teacher's College, Western Illinois State College, and Western Illinois University. The Association faces the challenge of cultivating emotional ties between groups of alumni who no longer know their alma mater by the name on their diplomas.

Critical to the successful implementation of this plan will be the students' positive experiences from the pre-freshman contact through graduation, and an awareness and appreciation for the history, mission, quality, and community of the University.

A major push to build the "self-esteem" of the University community is also critical to the success of the plan. In 1999, the University will celebrate its 100th anniversary. A celebration is being planned which will provide an opportunity for the Alumni Association and the campus to capitalize on their many strengths.

Continues

SAMPLE LONG-RANGE PLAN

WESTERN ILLINOIS UNIVERSITY

Financial Challenge

Budget resources from the state will continue to shrink, interest rates on investments have the potential to remain low, and the federal government is likely to withdraw nonprofit mailing subsidies. These constraints will force the Alumni Association to establish new ways of generating revenue to maintain alumni programming.

Affinity credit card, life insurance, and the sale of alumni class rings are only a few ways in which the Association is trying to generate additional revenue. With increased IRS scrutiny, every revenue-raising venture must clearly fit into the mission and not outweigh the Association's primary role as a not-for-profit organization. Unfortunately, time spent on revenue-generating projects takes time away from alumni programming, which is a mainstay of the Association's mission.

Staffing

Since 1978, when Western Illinois University had some 38,000 alumni, the Alumni Association staff has been comprised of a director, assistant director, and two secretaries. More than 16 years and 30,000 alumni later, the Alumni Association is still staffed by the same number of individuals (associate vice president for alumni programs, associate director, two secretaries), but these individuals are responsible for more programming, fund raising, etc.

One secretary II (temporary staff funded through revenue generated from merchandise sales) has been employed to handle the mountainous volume of address updates received through the *Western News*, phonathon, college newsletters, alumni surveys, and through the post office. As of December, 16,085 (619/week, 124/day) address updates have been entered. A permanent staff member responsible for updating the system is necessary as other staff members have assumed more program responsibility and student workers simply cannot get it done.

Student Alumni Relations

Recognizing the importance of the student experience on campus and how it affects alumni attitudes toward their alma mater, the Alumni Association utilized alumni surveys from Institutional Research to assist with the Strategic Plan.

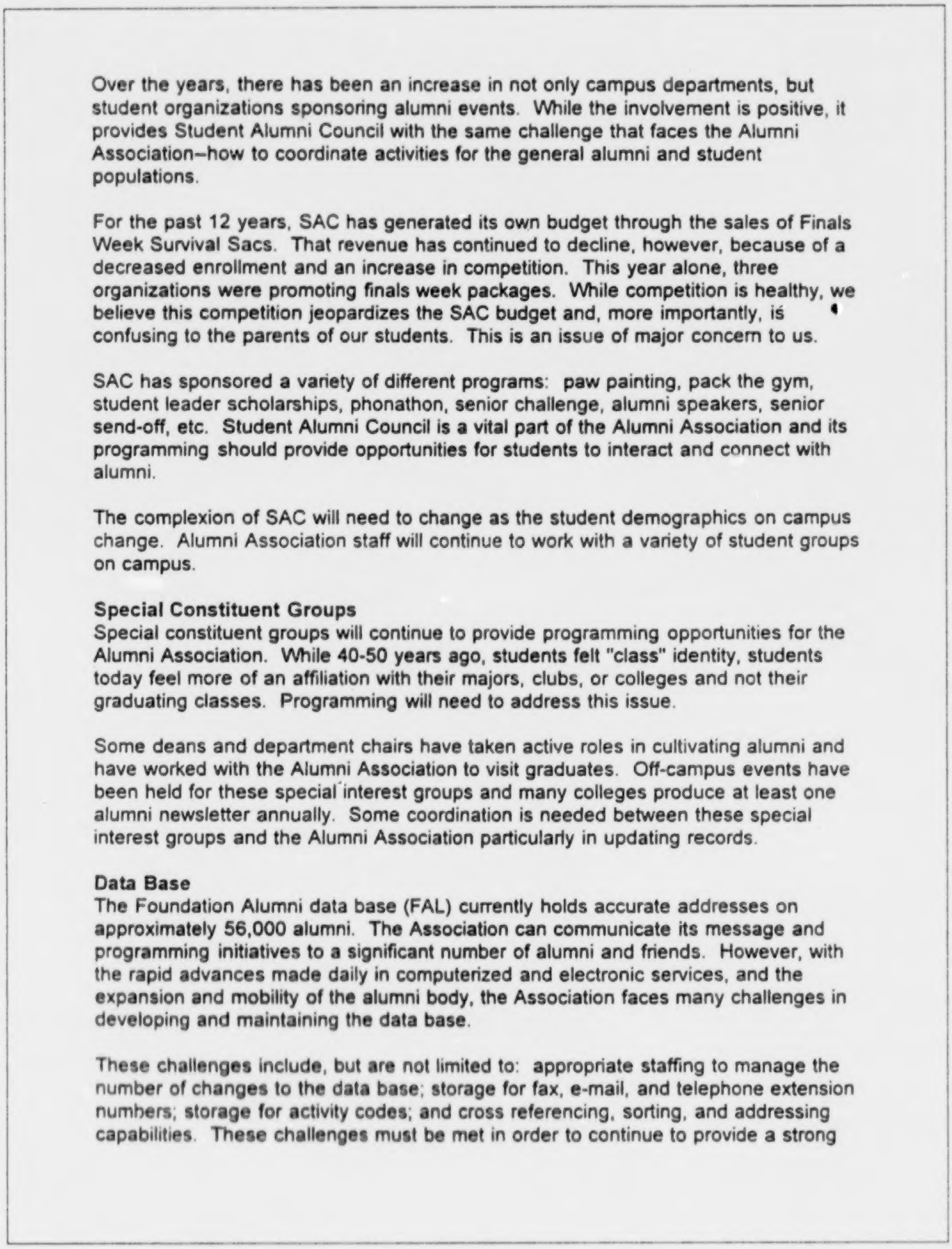
On the ACT Student Opinion Survey Report, students' satisfaction with WIU was higher than both the public college sample and the national sample on 21 of 42 categories which range from the Student Union to the testing/grading system. On 9 additional categories, WIU's satisfaction rate was higher than the public college sample.

In a survey of 1988 and 1984 baccalaureate degree recipients from WIU, 96.3% of the 1988 graduates and 95.5% of the 1984 graduates indicated their attitude towards the University as strongly positive or positive. In addition, 91% of the 1988 graduates and 88.5% of the 1984 graduates regarded their attitude towards their degree majors as strongly positive or positive. The outstanding rating of WIU on both the student opinion survey and the alumni survey indicates a good base from which to build a powerful Alumni Association.

Continues

SAMPLE LONG-RANGE PLAN

WESTERN ILLINOIS UNIVERSITY



Over the years, there has been an increase in not only campus departments, but student organizations sponsoring alumni events. While the involvement is positive, it provides Student Alumni Council with the same challenge that faces the Alumni Association–how to coordinate activities for the general alumni and student populations.

For the past 12 years, SAC has generated its own budget through the sales of Finals Week Survival Sacs. That revenue has continued to decline, however, because of a decreased enrollment and an increase in competition. This year alone, three organizations were promoting finals week packages. While competition is healthy, we believe this competition jeopardizes the SAC budget and, more importantly, is confusing to the parents of our students. This is an issue of major concern to us.

SAC has sponsored a variety of different programs: paw painting, pack the gym, student leader scholarships, phonathon, senior challenge, alumni speakers, senior send-off, etc. Student Alumni Council is a vital part of the Alumni Association and its programming should provide opportunities for students to interact and connect with alumni.

The complexion of SAC will need to change as the student demographics on campus change. Alumni Association staff will continue to work with a variety of student groups on campus.

Special Constituent Groups
Special constituent groups will continue to provide programming opportunities for the Alumni Association. While 40-50 years ago, students felt "class" identity, students today feel more of an affiliation with their majors, clubs, or colleges and not their graduating classes. Programming will need to address this issue.

Some deans and department chairs have taken active roles in cultivating alumni and have worked with the Alumni Association to visit graduates. Off-campus events have been held for these special interest groups and many colleges produce at least one alumni newsletter annually. Some coordination is needed between these special interest groups and the Alumni Association particularly in updating records.

Data Base
The Foundation Alumni data base (FAL) currently holds accurate addresses on approximately 56,000 alumni. The Association can communicate its message and programming initiatives to a significant number of alumni and friends. However, with the rapid advances made daily in computerized and electronic services, and the expansion and mobility of the alumni body, the Association faces many challenges in developing and maintaining the data base.

These challenges include, but are not limited to: appropriate staffing to manage the number of changes to the data base; storage for fax, e-mail, and telephone extension numbers; storage for activity codes; and cross referencing, sorting, and addressing capabilities. These challenges must be met in order to continue to provide a strong

Continues

data base–the foundation for an effective and successful alumni program.

Conclusion

The Alumni Association needs to be flexible and able to adapt to the changing needs and demands of a rapidly expanding and diverse alumni base. By challenging the status quo, implementation of this plan will help shape the future direction of alumni programs. Change tends to take time in institutions of higher learning. Recognizing the need to always work in unison with the University, the Alumni Association will continue to monitor campus needs and be positioned to meet those needs in the future.

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

Western Illinois University Alumni Association
Goals and Objectives

GOAL 1: **Enhance the organization through which alumni are involved in the progress and growth of the University.**

Projected growth for the number of alumni by the centennial year 1999 is 78,000. As the Association becomes a more complex organization, there will also be increased growth in the number of alumni groups within this diverse body of graduates. Therefore, it will be imperative for the Association to function as a strong umbrella organization meeting alumni needs and the Association's goals.

One-Year Objectives

a. Develop and implement a standardized alumni program evaluation process and determine measurements of success.

b. Ensure a diverse representation on the Alumni Council.

c. Maintain contact with past Association Board members.

d. Develop programs to meet alumni needs, i.e., community service, cultural recreational, educational, and career service programs. By the year 2000, 50% of college students will be more than 25 years of age and be attending school part-time.

e. Meet with student affairs professionals (CSP professors, Director of Student Activities, etc.) to determine trends in programming for students.

f. Maintain contact with departmental alumni boards.

g. Redefine Homecoming. It seems to have become a student event more than an alumni event. Provide programming which gives alumni a reason to return. Discuss the involvement of children of alumni in the weekend.

h. Further develop an alumni/admissions program.

i. Increase opportunities for networking.

j. Coordinate and promote continuing education opportunities for alumni. Recognizing By the year 2000, 75% of the work force will need to be trained, continuing education should be a growing area of programming for the Alumni Association.

Three-Year Objectives

k. Develop programming for special constituent groups, i.e. Minority, young alumni, baby boomers, half-century club.

l. Work with the Foundation to develop opportunities for alumni to participate in the centennial celebration.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

m. Rethink traditional dinners and socials and their purposes.

n. Develop a relocation network for alumni moving into a new area.

o. Develop on-site alumni events at corporations and/or schools.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 2: **Increase alumni visibility on campus.**
To create a greater awareness among students about their future role and responsibilities as alumni, an alumni presence needs to be fostered on campus.

One-Year Objectives

a. Highlight alumni in *Western News* and the *Western Courier* on a regular basis.

b. Provide alumni ribbons and WIU mugs? for those participating in the Placement office job fairs.

c. Maintain Alumni Council liaison structure.

d. Invite student leaders and faculty award recipients to an Alumni Council meeting.

e. Secure display case in the Union during finals week to display alumni award recipients, criteria for the awards, a "good luck graduates" message, information about the Alumni Association, and a reminder about Survival Sacs.

f. Increase participation in CAMP-WIU and refine the program.

g. Discuss utilizing local alumni for career panels, speakers following SAC meetings, dinner for 12 strangers.

h. Implement alumni admissions program.

Three-year objectives

i. Utilize career contact volunteers or drop the request.

j. Utilize electronic media to communicate alumni success to students and prospective students.

Five-year objectives

k. Dedicate an "Alumni" room in the Union and decorate it with memorabilia.

l. Display a wall of honor in the Union where alumni award recipients pictures would be displayed for the year.

m. Have an "office space" where visiting alumni could call their own for the time they are on campus (to make calls and leave personal belongings for the day).

n. Coordinate an "alumni" day on campus where alumni would return to the classroom, participate in panels, etc.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 3: **Increase opportunities for alumni recognition.**
Volunteers need to be formally recognized and thanked. Opportunities to thank and cultivate volunteers and donors at all levels need to be enhanced.

One-year objectives

a. Review current Association award structure, nomination process, and recognition ceremony and make necessary changes. Discuss "alumni volunteer of the year" award. Ensure enough awards are presented, recipients are being properly recognized.

b. Obtain guidelines for departmental and college awards and collect nomination forms for each award.

c. Develop a data bank of prominent alumni profiles which are easily attainable.

d. Develop mechanisms to identify potential awards nominees from the data base.

e. Maintain a current photo index of Council members.

f. Provide ribbons for alumni at scholarship banquets.

g. Utilize professors, chairs, etc. to submit alumni nominations.

Three-year objectives

h. In conjunction with the colleges and departments, invite college and departmental award recipients to the Distinguished Alumni/Alumni Achievement Awards Luncheon following Spring commencement.

i. Utilize successful alumni in admissions materials.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 4: **Work with WIN and through the Foundation to encourage financial support for the University**
Increased private support for the University is essential in order to maintain our margin of excellence.

One-Year objectives

a. Solicit past members of Student Alumni Council.

b. At alumni events, briefly mention the number of donors, the average gift, and the value of how their gifts can support current students.

c. Expand upon the theme of state assisted vs state-supported and the critical need for unrestricted dollars.

d. Continue to utilize phonathon callers to solicit funds for WIN.

e. Develop an annual WIN newsletter that describes where their money is being utilized.

Three-year objectives

f. Utilize the Alumni Council to broaden the base of support for the Alumni Association and WIN.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 5: **Evaluate FAL**
Improved data collection, storage, and manipulation of all forms of alumni data must be expanded.

One-year objectives

a. Consult with users, potential users, and other universities to learn what information will need to be stored on alumni.

b. Review data update cards to include additional information.

c. Publish lost alumni names and request updates.

d. Work with Publishing Concepts Inc. to develop an alumni survey to accompany directory mailing seeking programming data from alumni.

Three-year objectives

e. Determine how the IVR (interactive voice response) could be utilized with alumni.

f. Create on-line sorting capabilities for campus-wide access.

Five-year objectives

g. Develop automatic update reminder schedule to identify records that have not been updated in a given amount of time.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 6: **Improve communication with alumni and students**

The Alumni Association needs to inform and educate alumni about their role as preservers of Western's heritage. At the same time, increased alumni visibility on campus will lead to a greater awareness among students of their future roles as alumni. The Alumni Association needs to be able to send the same message in different ways to a variety of people as not all alumni see the University in the same way.

One-year objectives

a. Develop and administer a readership survey of *Western News*. If we don't ask, we won't know.

b. Publish four issues of *Western News*.

c. Create a public relations document/brochure which explains who we are and what we do.

d. Increase size of *Western News* to 11 x 17.

e. Fund a 4-page insert for homecoming issue.

f. Global bid brochures for alumni events to provide continuity, ease in production, and reduce costs.

Three year objectives

g. Research ways to financially support *Western News*, such as corporate or foundation underwriting.

h. Update association brochure.

i. Provide newsletter to senior status students regarding the Alumni Association.

j. Utilize technology, such as Internet, to communicate with international alumni. By the year 2000, 2 of 3 adults will own a home computer.

k. Develop a newsletter for all new students which includes information about WIU history, the Alumni Association etc.

l. Secure funding to allow the Alumni Association connection to the campus LAN.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 7: **Refine the programming of Student Alumni Council.** Recognizing that a positive undergraduate experience will lead to a greater chance for alumni involvement, the Alumni Association should have contact with all students.

One-year objectives

a. Create an informal "committee" of faculty, students, staff to review the research on alumni participation and adult and student development in order to propose a model of alumni involvement. This model will serve as the framework for planning programs that will maximize alumni satisfaction and involvement at the various stages identified.

b. Sponsor a host of activities throughout the year, both on and off-campus, to increase alumni visibility and to connect students with alumni. Examples and programs are addressed in **GOAL 2: Increase alumni visibility on campus.**

c. Strengthen the relationship between the Admission office and the ambassador committee of the Student Alumni Council.

Three-year objectives

d. Target each class and provide programming specifically designed to meet their needs. Freshmen: welcome gift from the Alumni Association; Sophomores: career contact file, dinner for 12 strangers, CAMP-WIU; Juniors: Career contact file, CAMP-WIU, career workshop, resume writing/interviewing; Seniors: senior mailing, senior send-off, senior challenge, homecoming, relocation network.

e. Target programming for young alumni 5-10 years out. Examples include social gatherings such as receptions, networking events, career-oriented programs and athletic events.

f. Target alumni 10-20 years out with alumni admissions, community service, and other family oriented events.

g. Target alumni 30+ years out with continuing education, travel, reunions, etc.

Continues

SAMPLE GOALS AND OBJECTIVES

WESTERN ILLINOIS UNIVERSITY

GOAL 8: **Secure additional staff and find additional sources of funding.** With the number of alumni continuing to increase and no incremental budget or staffing provided, the Alumni Association will need to explore ways to provide funding for additional staff, postage, programming, etc.

In the last year alone, the Alumni Association has been asked to take on responsibility for the Student Ambassador program, an alumni admissions program, collection of student surveys. These duties coupled with the expanding base of alumni and the diversity of that group, necessitates additional staff to handle the workload.

One year objectives:

a. Hire a secretary II to handle the majority of our address updates. This is a continuous job as evidenced by the 16,085 (619/week, 124/day) updates handled from July to December. (If each update took no longer than 2 minutes, it would take one individual 4 hours/day to complete the updates.)

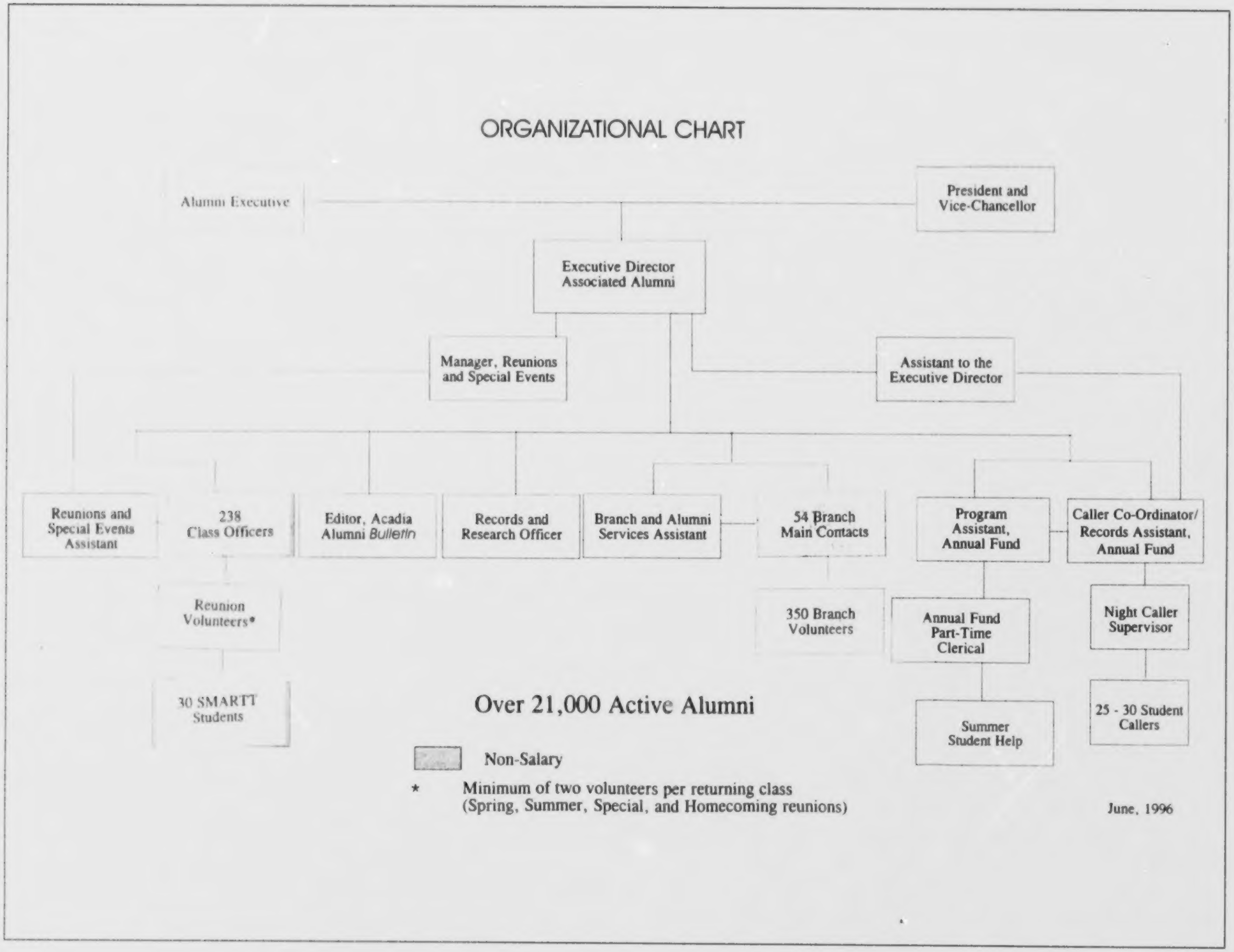
b. Work with the Foundation office to determine if corporate or grant money is available for programming.

APPENDIX II

ORGANIZATIONAL CHARTS AND JOB DESCRIPTIONS FOR THE ADVANCEMENT OFFICE

Acadia University
Berea College
Brunswick School
Colorado College
Community College of Allegheny County
Oberlin College
St. Mark's School of Texas

SAMPLE ORGANIZATIONAL CHART
ACADIA UNIVERSITY

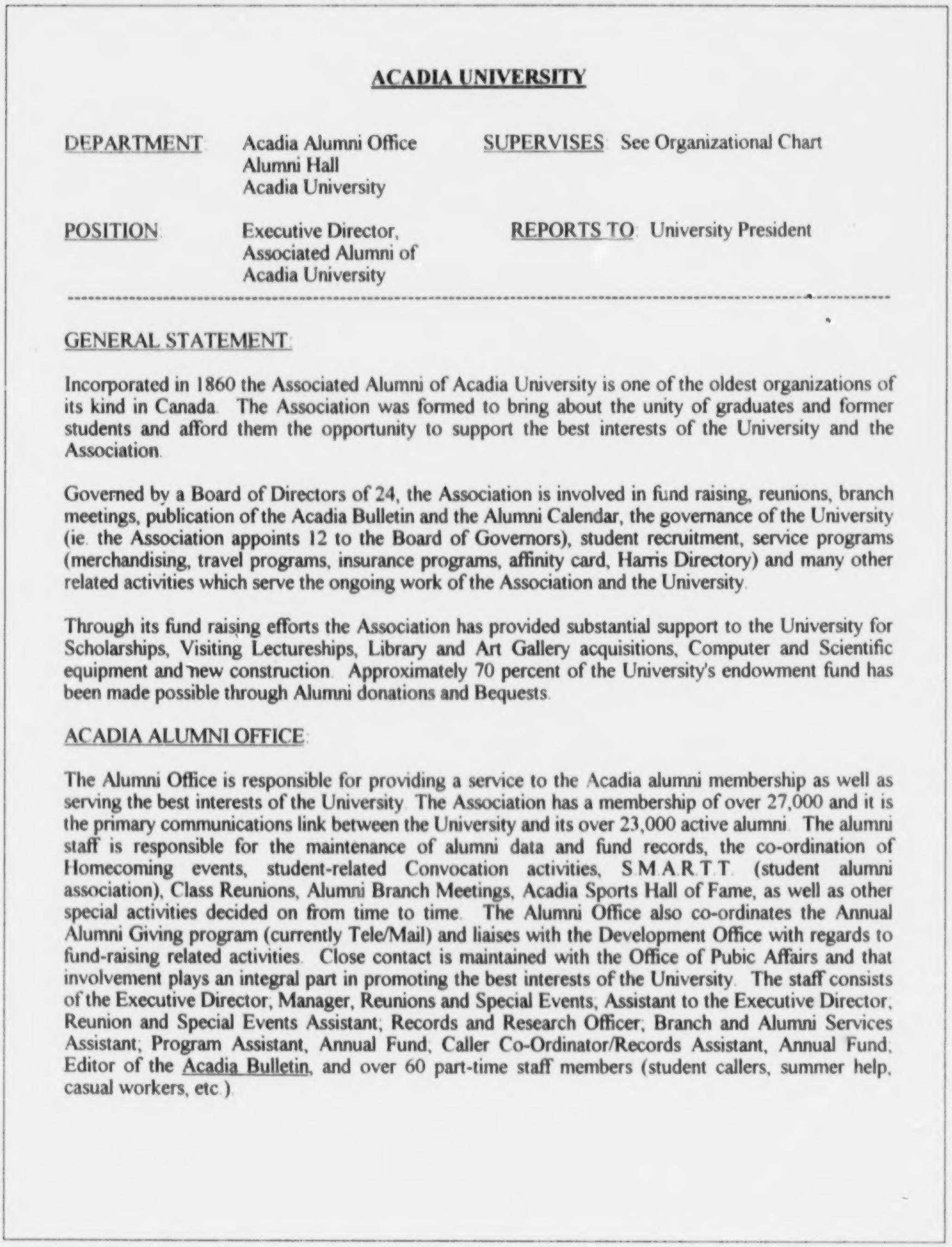

ORGANIZATIONAL CHART
Alumni Executive
President and Vice-Chancellor
Executive Director Associated Alumni
Manager, Reunions and Special Events
Assistant to the Executive Director
Reunions and Special Events Assistant
238 Class Officers
Reunion Volunteers*
30 SMARTT Students
Editor, Acadia Alumni Bulletin
Records and Research Officer
Branch and Alumni Services Assistant
54 Branch Main Contacts
350 Branch Volunteers
Program Assistant, Annual Fund
Annual Fund Part-Time Clerical
Summer Student Help
Caller Co-Ordinator/ Records Assistant, Annual Fund
Night Caller Supervisor
25 - 30 Student Callers
Over 21,000 Active Alumni
▨ Non-Salary
* Minimum of two volunteers per returning class (Spring, Summer, Special, and Homecoming reunions)
June, 1996

BEST COPY AVAILABLE

SAMPLE JOB DESCRIPTION

Executive Director, Associated Alumni

ACADIA UNIVERSITY



ACADIA UNIVERSITY

DEPARTMENT:	Acadia Alumni Office Alumni Hall Acadia University	SUPERVISES:	See Organizational Chart
POSITION:	Executive Director, Associated Alumni of Acadia University	REPORTS TO:	University President

GENERAL STATEMENT:

Incorporated in 1860 the Associated Alumni of Acadia University is one of the oldest organizations of its kind in Canada. The Association was formed to bring about the unity of graduates and former students and afford them the opportunity to support the best interests of the University and the Association.

Governed by a Board of Directors of 24, the Association is involved in fund raising, reunions, branch meetings, publication of the Acadia Bulletin and the Alumni Calendar, the governance of the University (ie. the Association appoints 12 to the Board of Governors), student recruitment, service programs (merchandising, travel programs, insurance programs, affinity card, Harris Directory) and many other related activities which serve the ongoing work of the Association and the University.

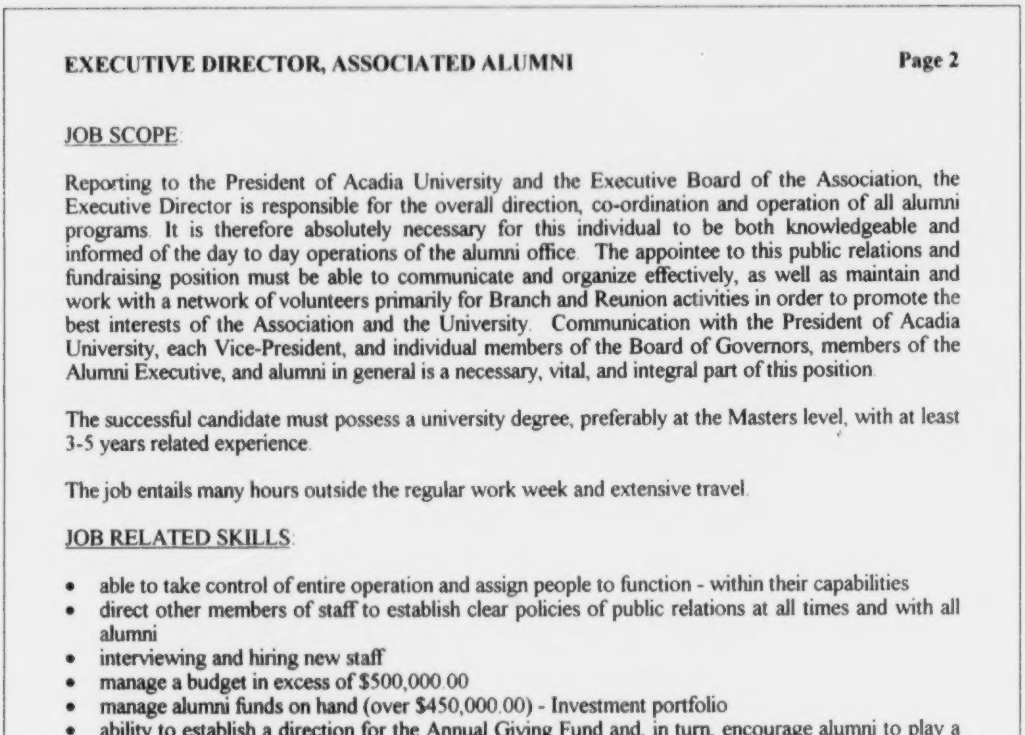
Through its fund raising efforts the Association has provided substantial support to the University for Scholarships, Visiting Lectureships, Library and Art Gallery acquisitions, Computer and Scientific equipment and new construction. Approximately 70 percent of the University's endowment fund has been made possible through Alumni donations and Bequests.

ACADIA ALUMNI OFFICE:

The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The Association has a membership of over 27,000 and it is the primary communications link between the University and its over 23,000 active alumni. The alumni staff is responsible for the maintenance of alumni data and fund records, the co-ordination of Homecoming events, student-related Convocation activities, S.M.A.R.T.T. (student alumni association), Class Reunions, Alumni Branch Meetings, Acadia Sports Hall of Fame, as well as other special activities decided on from time to time. The Alumni Office also co-ordinates the Annual Alumni Giving program (currently Tele/Mail) and liaises with the Development Office with regards to fund-raising related activities. Close contact is maintained with the Office of Pubic Affairs and that involvement plays an integral part in promoting the best interests of the University. The staff consists of the Executive Director; Manager, Reunions and Special Events; Assistant to the Executive Director; Reunion and Special Events Assistant; Records and Research Officer; Branch and Alumni Services Assistant; Program Assistant, Annual Fund; Caller Co-Ordinator/Records Assistant, Annual Fund; Editor of the Acadia Bulletin, and over 60 part-time staff members (student callers, summer help, casual workers, etc.).

Continues

SAMPLE JOB DESCRIPTION
Executive Director, Associated Alumni
ACADIA UNIVERSITY



EXECUTIVE DIRECTOR, ASSOCIATED ALUMNI **Page 2**

JOB SCOPE:

Reporting to the President of Acadia University and the Executive Board of the Association, the Executive Director is responsible for the overall direction, co-ordination and operation of all alumni programs. It is therefore absolutely necessary for this individual to be both knowledgeable and informed of the day to day operations of the alumni office. The appointee to this public relations and fundraising position must be able to communicate and organize effectively, as well as maintain and work with a network of volunteers primarily for Branch and Reunion activities in order to promote the best interests of the Association and the University. Communication with the President of Acadia University, each Vice-President, and individual members of the Board of Governors, members of the Alumni Executive, and alumni in general is a necessary, vital, and integral part of this position.

The successful candidate must possess a university degree, preferably at the Masters level, with at least 3-5 years related experience.

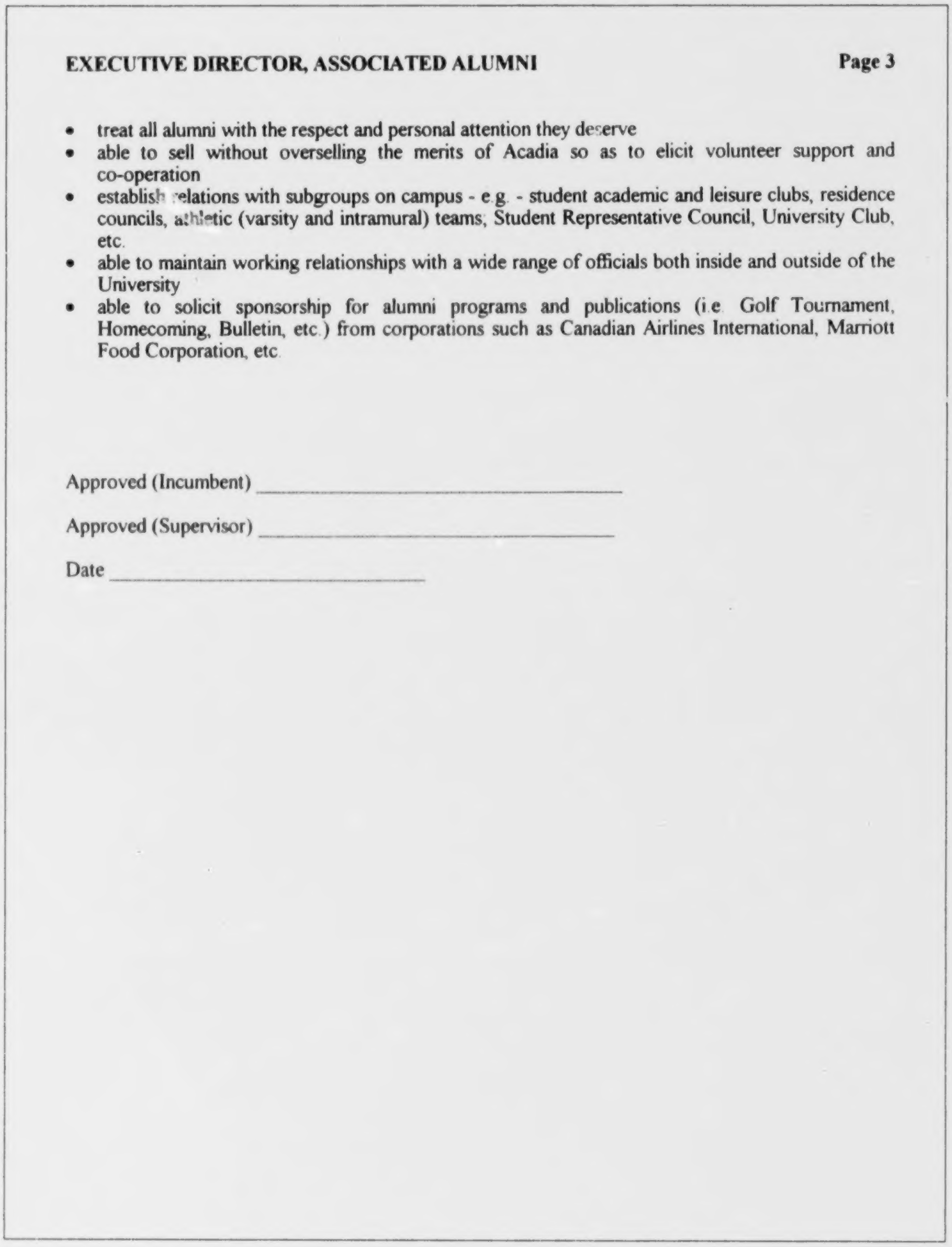
The job entails many hours outside the regular work week and extensive travel.

JOB RELATED SKILLS:

- able to take control of entire operation and assign people to function - within their capabilities
- direct other members of staff to establish clear policies of public relations at all times and with all alumni
- interviewing and hiring new staff
- manage a budget in excess of $500,000.00
- manage alumni funds on hand (over $450,000.00) - Investment portfolio
- ability to establish a direction for the Annual Giving Fund and, in turn, encourage alumni to play a vital role in support of the University
- interface with virtually all Departments on campus in promoting Acadia University
- ability to develop and oversee major projects (i.e. Alumni Hall, Tele/Mail)
- able to speak to large and small gatherings in a relaxed and confident manner about Acadia
- show interest in all generations of graduates (able to relate to early and late grads at a variety of social functions)
- assist with smooth running of executive meetings and sub-committees
- sensitive to degree of involvement of executive members in University affairs
- sensitive to protocol and proper channels of communication to all areas of University
- develop a pride in staff "how may we serve you" attitude
- ability to express ideas effectively both orally and in writing
- organize the energy and time of alumni volunteers to assist with fund raising, branch meetings, reunion activities (i.e. over 300 Branch volunteers, over 240 class officers)
- able to be tactful in relating unpleasant news or results (i.e. Board of Governor Elections, Alumni Executive nominations, etc.)
- be consistently enthusiastic - Alumni Office should be the first place graduates go because of the terrific reception they receive
- get to know almost on a first-name basis as many of the returning alumni as possible
- get to know graduating class members and ensure that they feel welcome to return to Acadia and always feel comfortable in maintaining contact with the Alumni Office

Continues

SAMPLE JOB DESCRIPTION
Executive Director, Associated Alumni
ACADIA UNIVERSITY



EXECUTIVE DIRECTOR, ASSOCIATED ALUMNI **Page 3**

- treat all alumni with the respect and personal attention they deserve
- able to sell without overselling the merits of Acadia so as to elicit volunteer support and co-operation
- establish relations with subgroups on campus - e.g. - student academic and leisure clubs, residence councils, athletic (varsity and intramural) teams; Student Representative Council, University Club, etc.
- able to maintain working relationships with a wide range of officials both inside and outside of the University
- able to solicit sponsorship for alumni programs and publications (i.e. Golf Tournament, Homecoming, Bulletin, etc.) from corporations such as Canadian Airlines International, Marriott Food Corporation, etc.

Approved (Incumbent) ________________________________

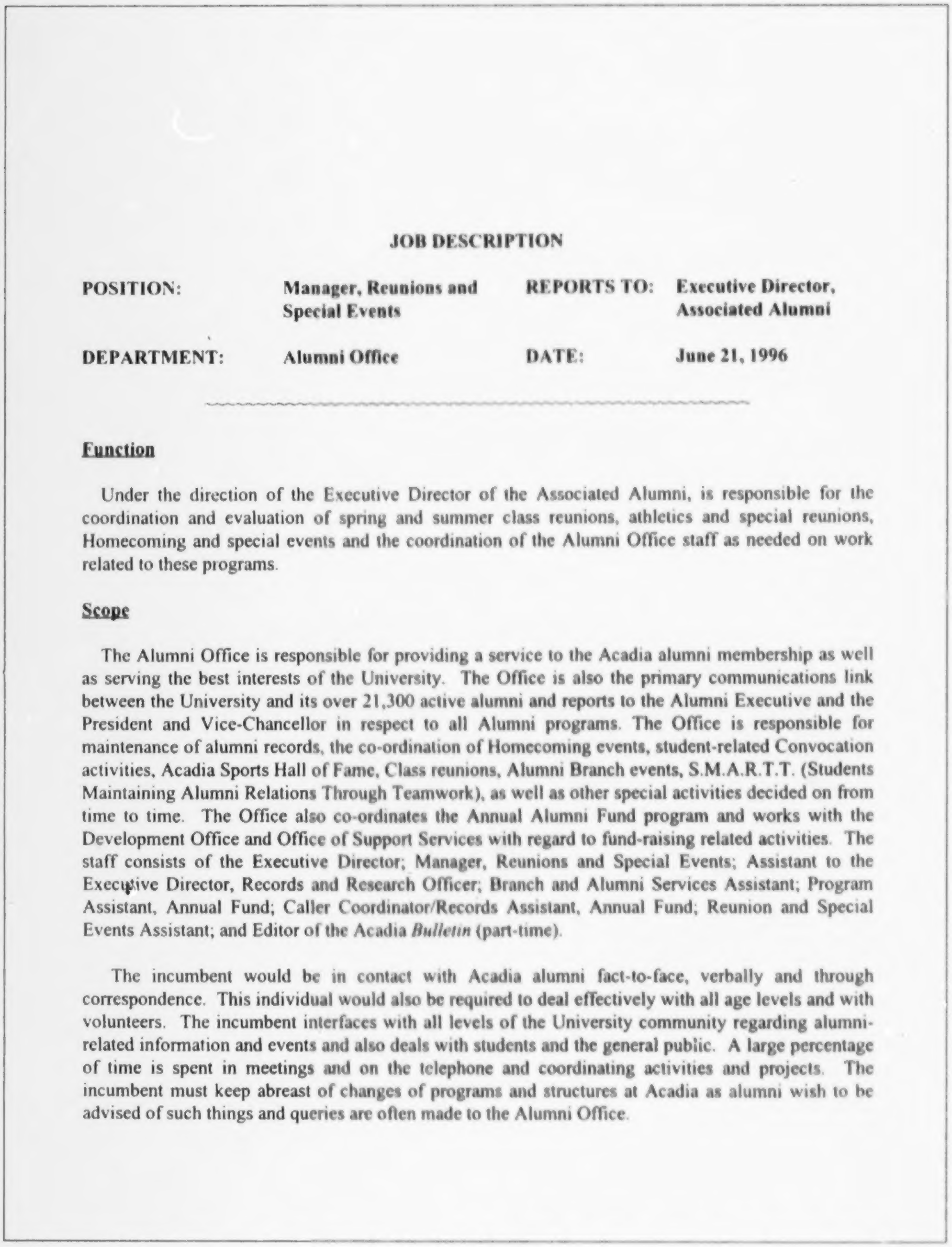
Approved (Supervisor) ________________________________

Date ____________________________

SAMPLE JOB DESCRIPTION

Manager, Reunions and Special Events

ACADIA UNIVERSITY



JOB DESCRIPTION

POSITION:	**Manager, Reunions and Special Events**	REPORTS TO:	**Executive Director, Associated Alumni**
DEPARTMENT:	**Alumni Office**	DATE:	**June 21, 1996**

Function

Under the direction of the Executive Director of the Associated Alumni, is responsible for the coordination and evaluation of spring and summer class reunions, athletics and special reunions, Homecoming and special events and the coordination of the Alumni Office staff as needed on work related to these programs.

Scope

The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The Office is also the primary communications link between the University and its over 21,300 active alumni and reports to the Alumni Executive and the President and Vice-Chancellor in respect to all Alumni programs. The Office is responsible for maintenance of alumni records, the co-ordination of Homecoming events, student-related Convocation activities, Acadia Sports Hall of Fame, Class reunions, Alumni Branch events, S.M.A.R.T.T. (Students Maintaining Alumni Relations Through Teamwork), as well as other special activities decided on from time to time. The Office also co-ordinates the Annual Alumni Fund program and works with the Development Office and Office of Support Services with regard to fund-raising related activities. The staff consists of the Executive Director; Manager, Reunions and Special Events; Assistant to the Executive Director, Records and Research Officer; Branch and Alumni Services Assistant; Program Assistant, Annual Fund; Caller Coordinator/Records Assistant, Annual Fund; Reunion and Special Events Assistant; and Editor of the Acadia *Bulletin* (part-time).

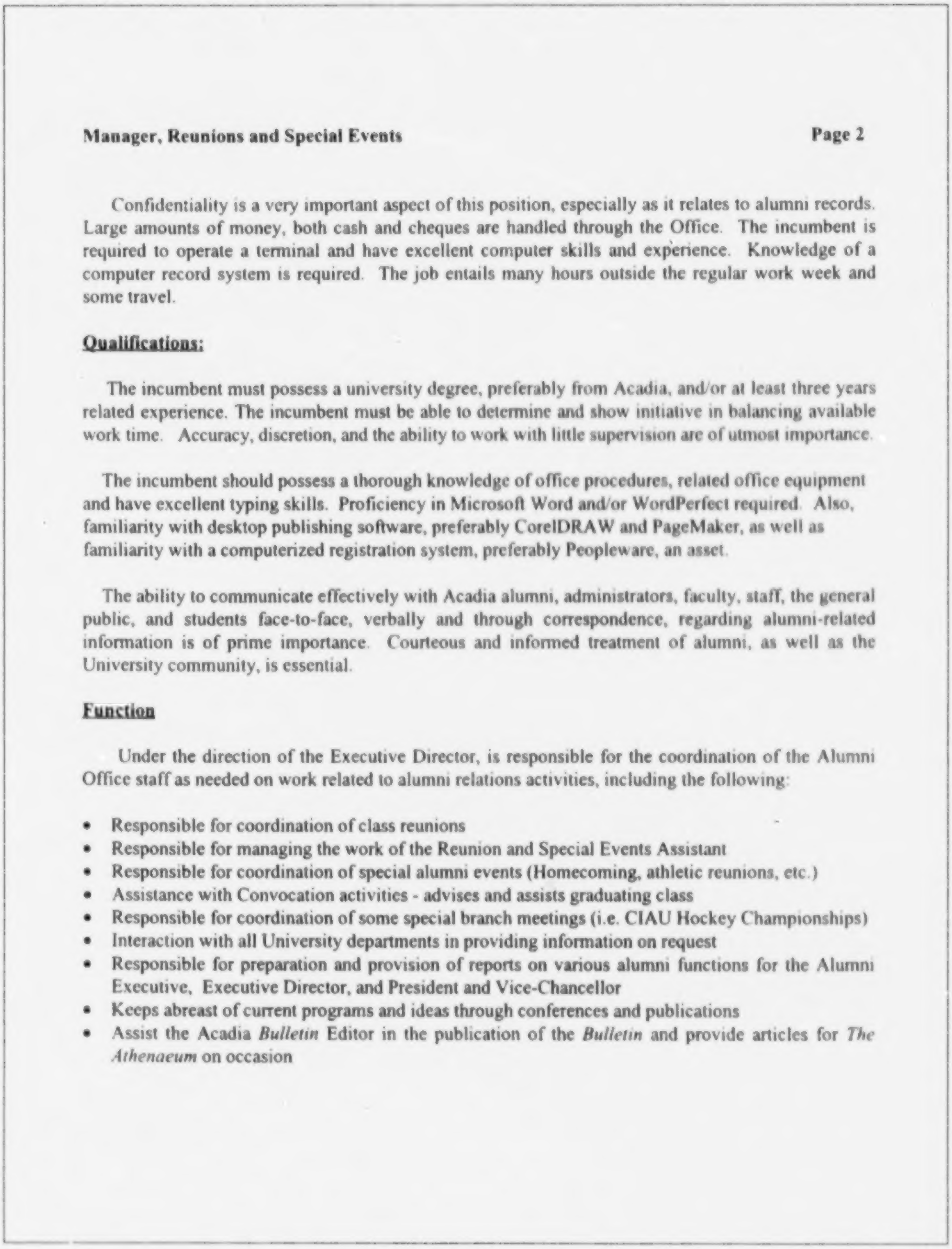
The incumbent would be in contact with Acadia alumni fact-to-face, verbally and through correspondence. This individual would also be required to deal effectively with all age levels and with volunteers. The incumbent interfaces with all levels of the University community regarding alumni-related information and events and also deals with students and the general public. A large percentage of time is spent in meetings and on the telephone and coordinating activities and projects. The incumbent must keep abreast of changes of programs and structures at Acadia as alumni wish to be advised of such things and queries are often made to the Alumni Office.

Continues

SAMPLE JOB DESCRIPTION

Manager, Reunions and Special Events

ACADIA UNIVERSITY



Manager, Reunions and Special Events **Page 2**

Confidentiality is a very important aspect of this position, especially as it relates to alumni records. Large amounts of money, both cash and cheques are handled through the Office. The incumbent is required to operate a terminal and have excellent computer skills and experience. Knowledge of a computer record system is required. The job entails many hours outside the regular work week and some travel.

Qualifications:

The incumbent must possess a university degree, preferably from Acadia, and/or at least three years related experience. The incumbent must be able to determine and show initiative in balancing available work time. Accuracy, discretion, and the ability to work with little supervision are of utmost importance.

The incumbent should possess a thorough knowledge of office procedures, related office equipment and have excellent typing skills. Proficiency in Microsoft Word and/or WordPerfect required. Also, familiarity with desktop publishing software, preferably CorelDRAW and PageMaker, as well as familiarity with a computerized registration system, preferably Peopleware, an asset.

The ability to communicate effectively with Acadia alumni, administrators, faculty, staff, the general public, and students face-to-face, verbally and through correspondence, regarding alumni-related information is of prime importance. Courteous and informed treatment of alumni, as well as the University community, is essential.

Function

Under the direction of the Executive Director, is responsible for the coordination of the Alumni Office staff as needed on work related to alumni relations activities, including the following:

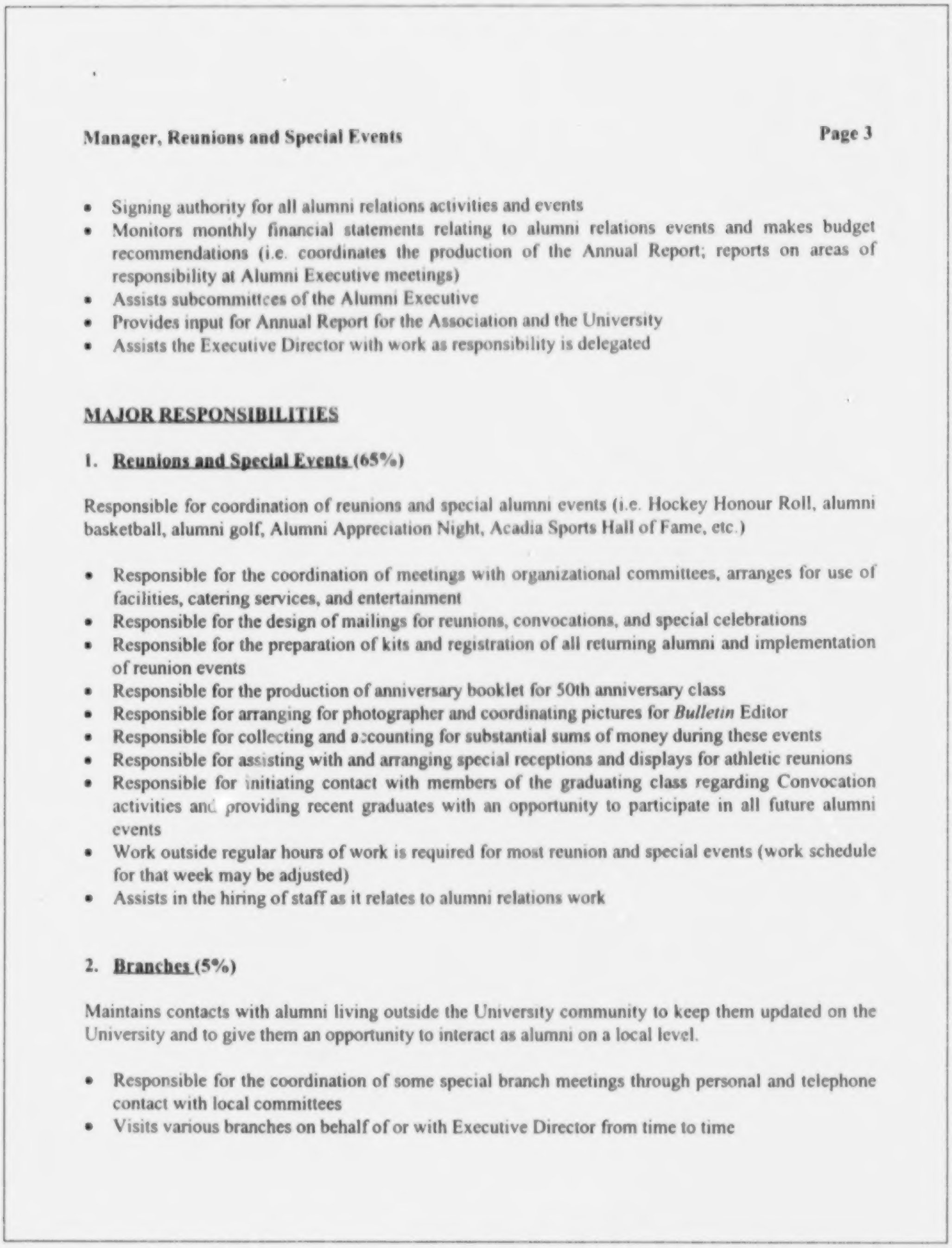
- Responsible for coordination of class reunions
- Responsible for managing the work of the Reunion and Special Events Assistant
- Responsible for coordination of special alumni events (Homecoming, athletic reunions, etc.)
- Assistance with Convocation activities - advises and assists graduating class
- Responsible for coordination of some special branch meetings (i.e. CIAU Hockey Championships)
- Interaction with all University departments in providing information on request
- Responsible for preparation and provision of reports on various alumni functions for the Alumni Executive, Executive Director, and President and Vice-Chancellor
- Keeps abreast of current programs and ideas through conferences and publications
- Assist the Acadia *Bulletin* Editor in the publication of the *Bulletin* and provide articles for *The Athenaeum* on occasion

Continues

SAMPLE JOB DESCRIPTION

Manager, Reunions and Special Events

ACADIA UNIVERSITY



Manager, Reunions and Special Events **Page 3**

- Signing authority for all alumni relations activities and events
- Monitors monthly financial statements relating to alumni relations events and makes budget recommendations (i.e. coordinates the production of the Annual Report; reports on areas of responsibility at Alumni Executive meetings)
- Assists subcommittees of the Alumni Executive
- Provides input for Annual Report for the Association and the University
- Assists the Executive Director with work as responsibility is delegated

MAJOR RESPONSIBILITIES

1. **Reunions and Special Events** (65%)

Responsible for coordination of reunions and special alumni events (i.e. Hockey Honour Roll, alumni basketball, alumni golf, Alumni Appreciation Night, Acadia Sports Hall of Fame, etc.)

- Responsible for the coordination of meetings with organizational committees, arranges for use of facilities, catering services, and entertainment
- Responsible for the design of mailings for reunions, convocations, and special celebrations
- Responsible for the preparation of kits and registration of all returning alumni and implementation of reunion events
- Responsible for the production of anniversary booklet for 50th anniversary class
- Responsible for arranging for photographer and coordinating pictures for *Bulletin* Editor
- Responsible for collecting and accounting for substantial sums of money during these events
- Responsible for assisting with and arranging special receptions and displays for athletic reunions
- Responsible for initiating contact with members of the graduating class regarding Convocation activities and providing recent graduates with an opportunity to participate in all future alumni events
- Work outside regular hours of work is required for most reunion and special events (work schedule for that week may be adjusted)
- Assists in the hiring of staff as it relates to alumni relations work

2. **Branches** (5%)

Maintains contacts with alumni living outside the University community to keep them updated on the University and to give them an opportunity to interact as alumni on a local level.

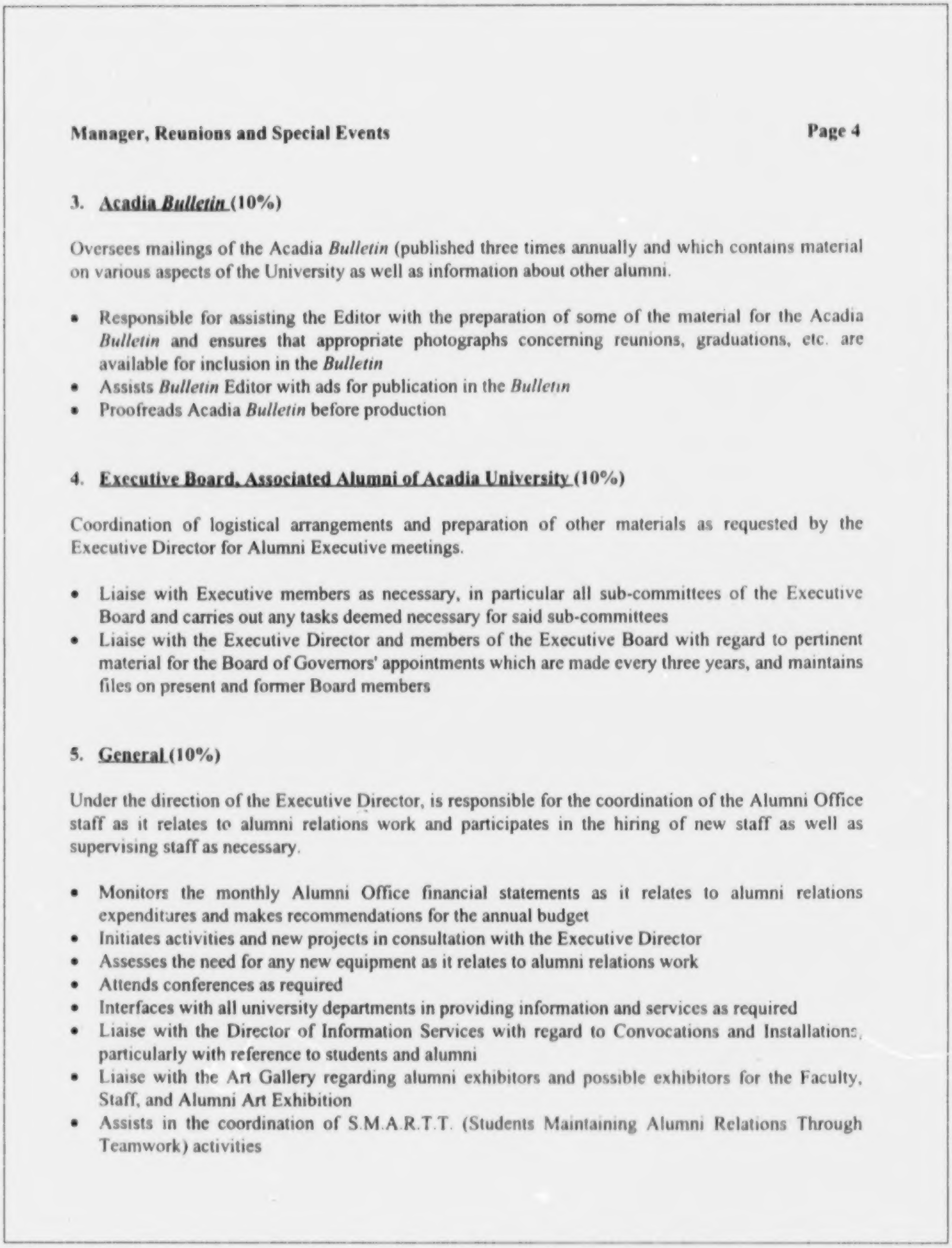
- Responsible for the coordination of some special branch meetings through personal and telephone contact with local committees
- Visits various branches on behalf of or with Executive Director from time to time

Continues

SAMPLE JOB DESCRIPTION

Manager, Reunions and Special Events

ACADIA UNIVERSITY



3. Acadia *Bulletin* (10%)

Oversees mailings of the Acadia *Bulletin* (published three times annually and which contains material on various aspects of the University as well as information about other alumni.

- Responsible for assisting the Editor with the preparation of some of the material for the Acadia *Bulletin* and ensures that appropriate photographs concerning reunions, graduations, etc. are available for inclusion in the *Bulletin*
- Assists *Bulletin* Editor with ads for publication in the *Bulletin*
- Proofreads Acadia *Bulletin* before production

4. Executive Board, Associated Alumni of Acadia University (10%)

Coordination of logistical arrangements and preparation of other materials as requested by the Executive Director for Alumni Executive meetings.

- Liaise with Executive members as necessary, in particular all sub-committees of the Executive Board and carries out any tasks deemed necessary for said sub-committees
- Liaise with the Executive Director and members of the Executive Board with regard to pertinent material for the Board of Governors' appointments which are made every three years, and maintains files on present and former Board members

5. General (10%)

Under the direction of the Executive Director, is responsible for the coordination of the Alumni Office staff as it relates to alumni relations work and participates in the hiring of new staff as well as supervising staff as necessary.

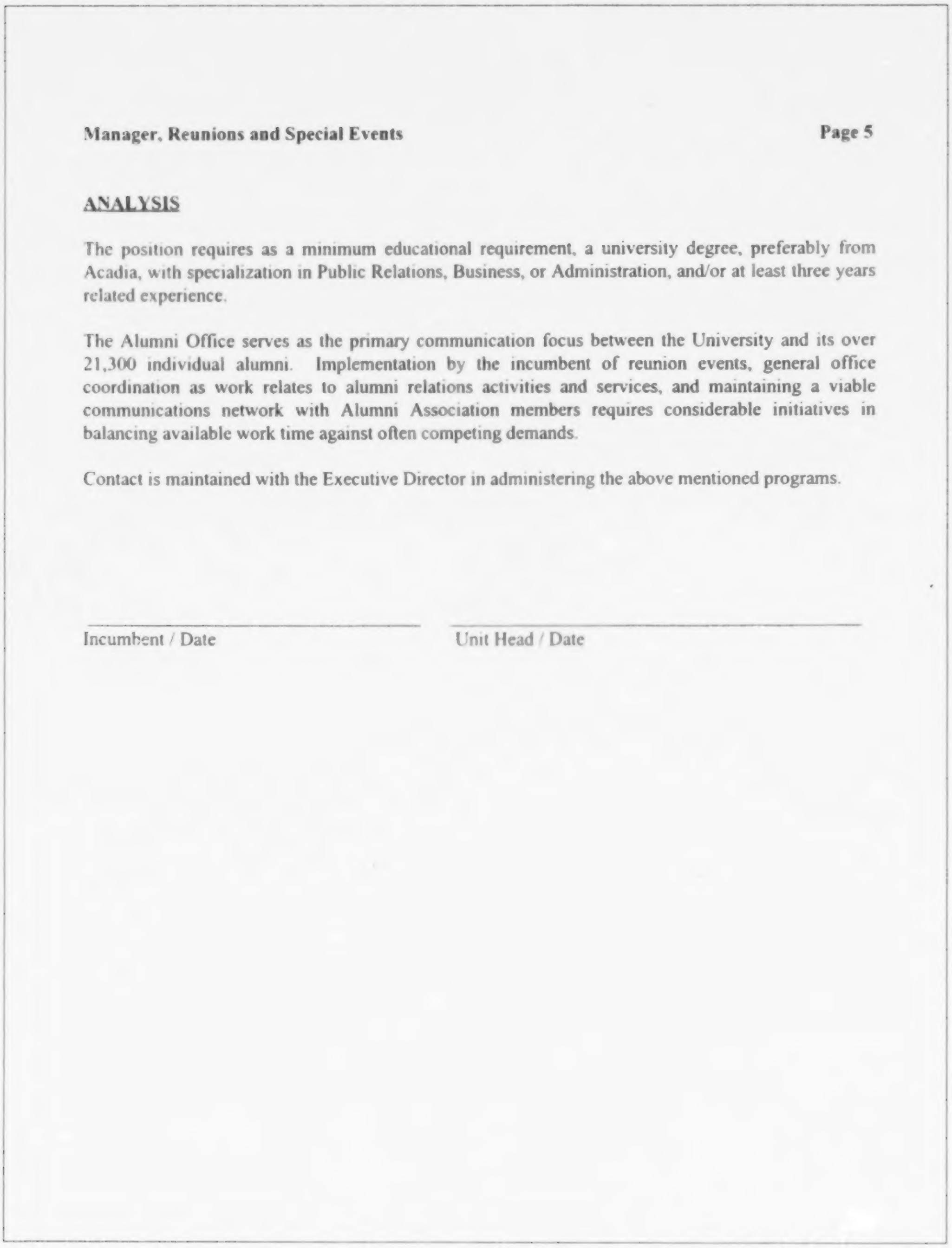
- Monitors the monthly Alumni Office financial statements as it relates to alumni relations expenditures and makes recommendations for the annual budget
- Initiates activities and new projects in consultation with the Executive Director
- Assesses the need for any new equipment as it relates to alumni relations work
- Attends conferences as required
- Interfaces with all university departments in providing information and services as required
- Liaise with the Director of Information Services with regard to Convocations and Installations, particularly with reference to students and alumni
- Liaise with the Art Gallery regarding alumni exhibitors and possible exhibitors for the Faculty, Staff, and Alumni Art Exhibition
- Assists in the coordination of S.M.A.R.T.T. (Students Maintaining Alumni Relations Through Teamwork) activities

Continues

SAMPLE JOB DESCRIPTION

Manager, Reunions and Special Events

ACADIA UNIVERSITY



Manager, Reunions and Special Events **Page 5**

ANALYSIS

The position requires as a minimum educational requirement, a university degree, preferably from Acadia, with specialization in Public Relations, Business, or Administration, and/or at least three years related experience.

The Alumni Office serves as the primary communication focus between the University and its over 21,300 individual alumni. Implementation by the incumbent of reunion events, general office coordination as work relates to alumni relations activities and services, and maintaining a viable communications network with Alumni Association members requires considerable initiatives in balancing available work time against often competing demands.

Contact is maintained with the Executive Director in administering the above mentioned programs.

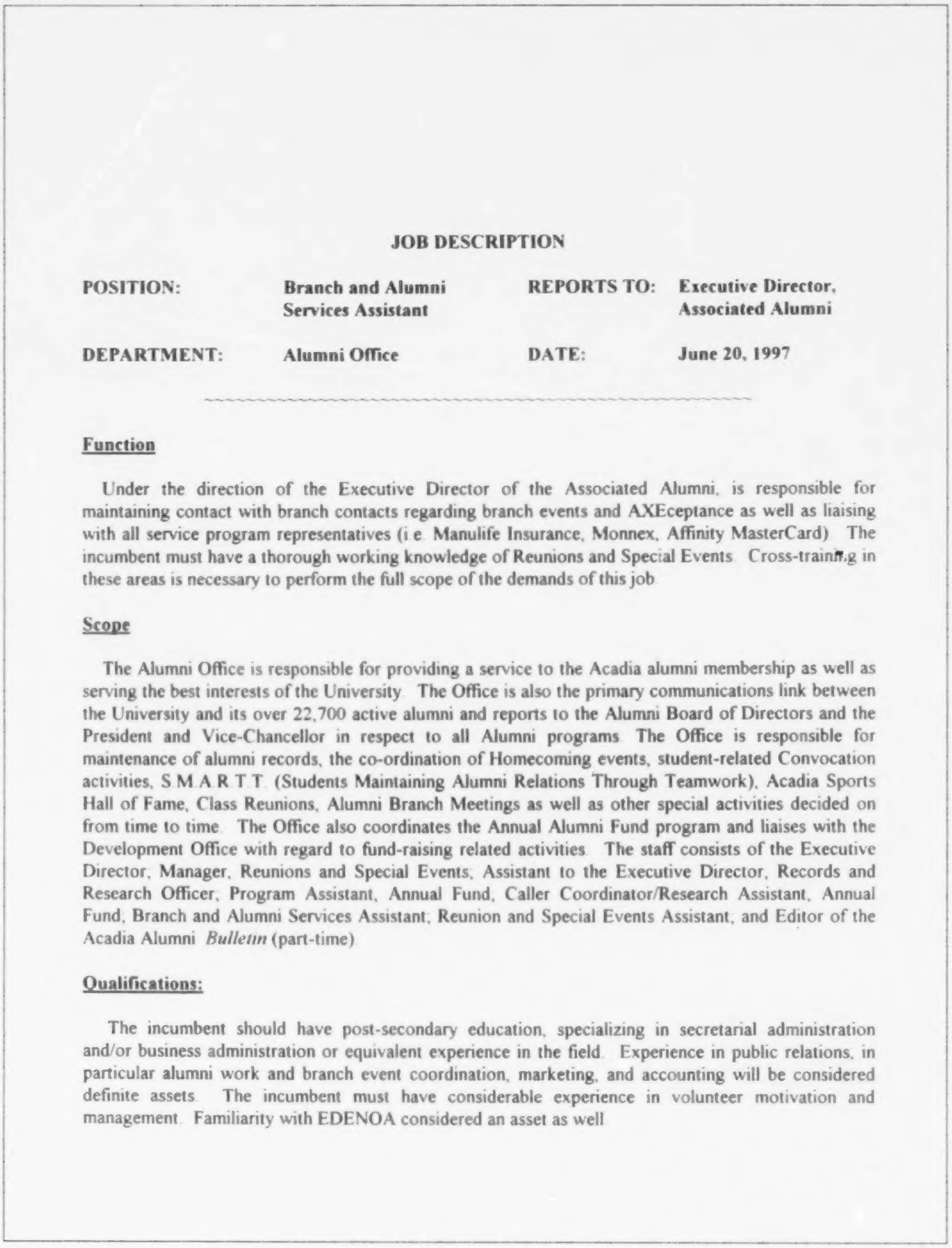
Incumbent / Date

Unit Head / Date

SAMPLE JOB DESCRIPTION

Branch and Alumni Services Assistant

ACADIA UNIVERSITY



JOB DESCRIPTION

POSITION:	**Branch and Alumni Services Assistant**	**REPORTS TO:**	**Executive Director, Associated Alumni**
DEPARTMENT:	**Alumni Office**	**DATE:**	**June 20, 1997**

Function

Under the direction of the Executive Director of the Associated Alumni, is responsible for maintaining contact with branch contacts regarding branch events and AXEceptance as well as liaising with all service program representatives (i.e. Manulife Insurance, Monnex, Affinity MasterCard). The incumbent must have a thorough working knowledge of Reunions and Special Events. Cross-training in these areas is necessary to perform the full scope of the demands of this job.

Scope

The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The Office is also the primary communications link between the University and its over 22,700 active alumni and reports to the Alumni Board of Directors and the President and Vice-Chancellor in respect to all Alumni programs. The Office is responsible for maintenance of alumni records, the co-ordination of Homecoming events, student-related Convocation activities, S.M.A.R.T.T. (Students Maintaining Alumni Relations Through Teamwork), Acadia Sports Hall of Fame, Class Reunions, Alumni Branch Meetings as well as other special activities decided on from time to time. The Office also coordinates the Annual Alumni Fund program and liaises with the Development Office with regard to fund-raising related activities. The staff consists of the Executive Director; Manager, Reunions and Special Events; Assistant to the Executive Director; Records and Research Officer; Program Assistant, Annual Fund; Caller Coordinator/Research Assistant, Annual Fund; Branch and Alumni Services Assistant; Reunion and Special Events Assistant; and Editor of the Acadia Alumni *Bulletin* (part-time).

Qualifications:

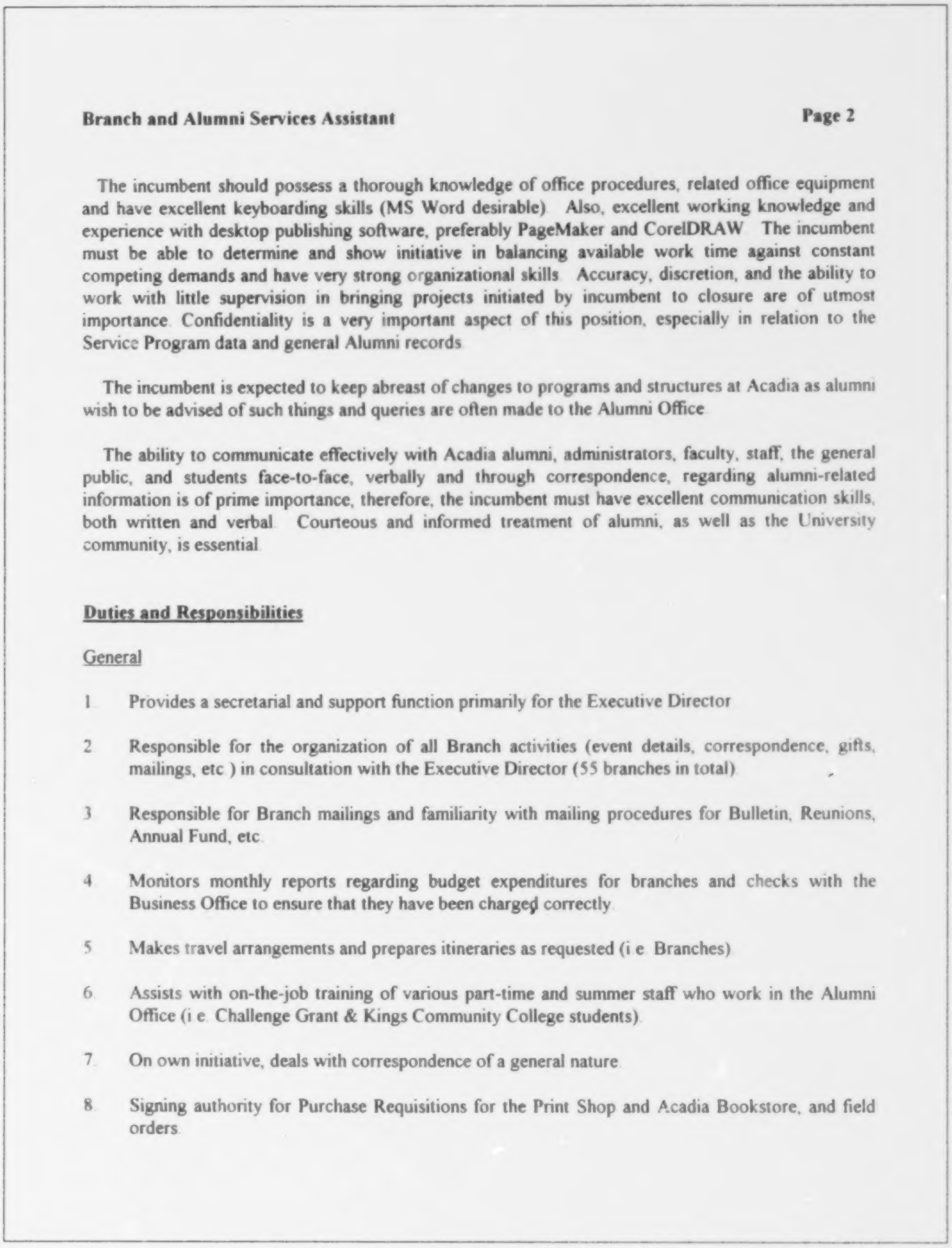
The incumbent should have post-secondary education, specializing in secretarial administration and/or business administration or equivalent experience in the field. Experience in public relations, in particular alumni work and branch event coordination, marketing, and accounting will be considered definite assets. The incumbent must have considerable experience in volunteer motivation and management. Familiarity with EDENOA considered an asset as well.

Continues

SAMPLE JOB DESCRIPTION

Branch and Alumni Services Assistant

ACADIA UNIVERSITY



Branch and Alumni Services Assistant **Page 2**

The incumbent should possess a thorough knowledge of office procedures, related office equipment and have excellent keyboarding skills (MS Word desirable). Also, excellent working knowledge and experience with desktop publishing software, preferably PageMaker and CorelDRAW. The incumbent must be able to determine and show initiative in balancing available work time against constant competing demands and have very strong organizational skills. Accuracy, discretion, and the ability to work with little supervision in bringing projects initiated by incumbent to closure are of utmost importance. Confidentiality is a very important aspect of this position, especially in relation to the Service Program data and general Alumni records.

The incumbent is expected to keep abreast of changes to programs and structures at Acadia as alumni wish to be advised of such things and queries are often made to the Alumni Office.

The ability to communicate effectively with Acadia alumni, administrators, faculty, staff, the general public, and students face-to-face, verbally and through correspondence, regarding alumni-related information is of prime importance, therefore, the incumbent must have excellent communication skills, both written and verbal. Courteous and informed treatment of alumni, as well as the University community, is essential.

Duties and Responsibilities

General

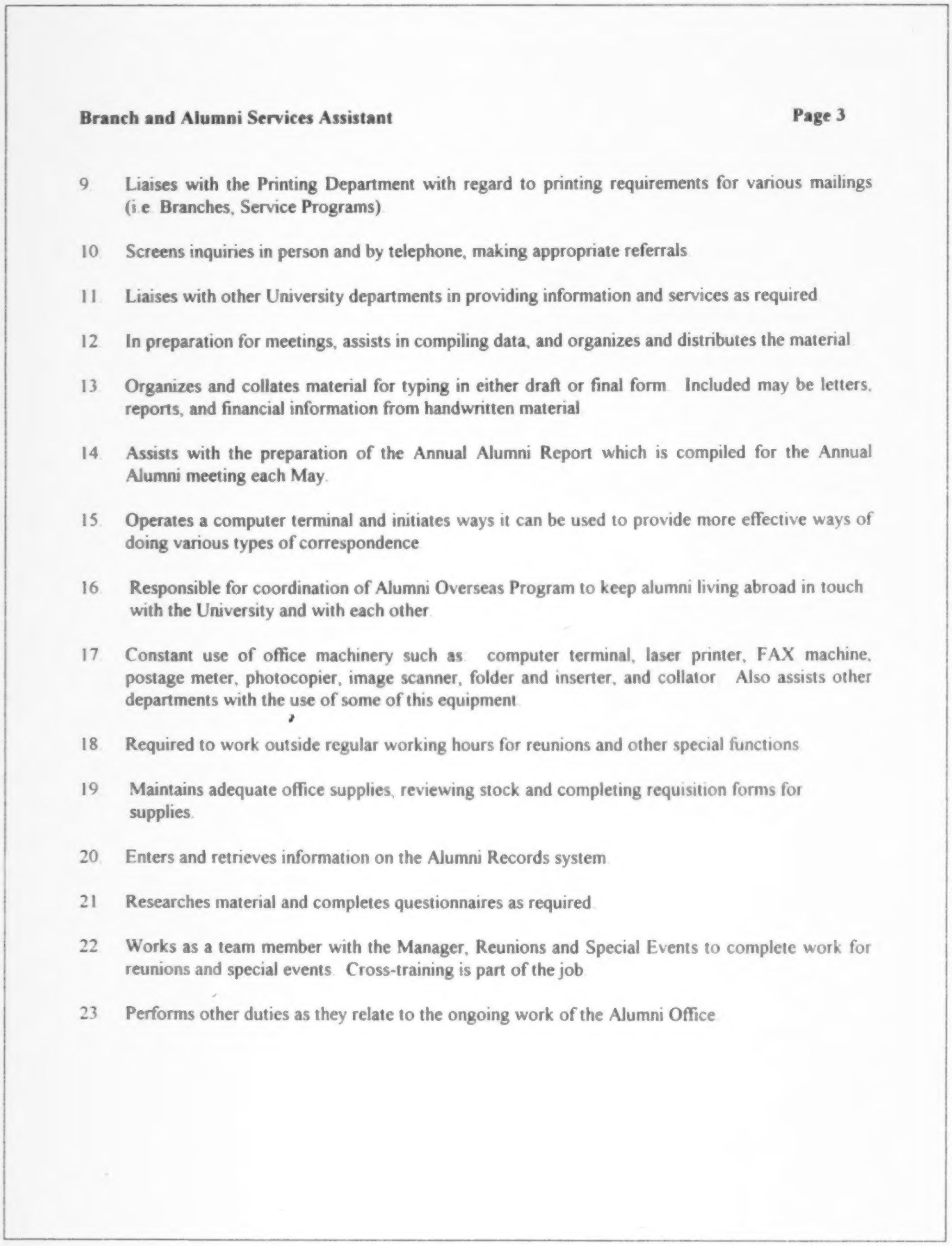
1. Provides a secretarial and support function primarily for the Executive Director.
2. Responsible for the organization of all Branch activities (event details, correspondence, gifts, mailings, etc.) in consultation with the Executive Director (55 branches in total).
3. Responsible for Branch mailings and familiarity with mailing procedures for Bulletin, Reunions, Annual Fund, etc.
4. Monitors monthly reports regarding budget expenditures for branches and checks with the Business Office to ensure that they have been charged correctly.
5. Makes travel arrangements and prepares itineraries as requested (i.e. Branches).
6. Assists with on-the-job training of various part-time and summer staff who work in the Alumni Office (i.e. Challenge Grant & Kings Community College students).
7. On own initiative, deals with correspondence of a general nature.
8. Signing authority for Purchase Requisitions for the Print Shop and Acadia Bookstore, and field orders.

Continues

SAMPLE JOB DESCRIPTION

Branch and Alumni Services Assistant

ACADIA UNIVERSITY



Branch and Alumni Services Assistant **Page 3**

9. Liaises with the Printing Department with regard to printing requirements for various mailings (i.e. Branches, Service Programs).

10. Screens inquiries in person and by telephone, making appropriate referrals.

11. Liaises with other University departments in providing information and services as required.

12. In preparation for meetings, assists in compiling data, and organizes and distributes the material.

13. Organizes and collates material for typing in either draft or final form. Included may be letters, reports, and financial information from handwritten material.

14. Assists with the preparation of the Annual Alumni Report which is compiled for the Annual Alumni meeting each May.

15. Operates a computer terminal and initiates ways it can be used to provide more effective ways of doing various types of correspondence.

16. Responsible for coordination of Alumni Overseas Program to keep alumni living abroad in touch with the University and with each other.

17. Constant use of office machinery such as: computer terminal, laser printer, FAX machine, postage meter, photocopier, image scanner, folder and inserter, and collator. Also assists other departments with the use of some of this equipment.

18. Required to work outside regular working hours for reunions and other special functions.

19. Maintains adequate office supplies, reviewing stock and completing requisition forms for supplies.

20. Enters and retrieves information on the Alumni Records system.

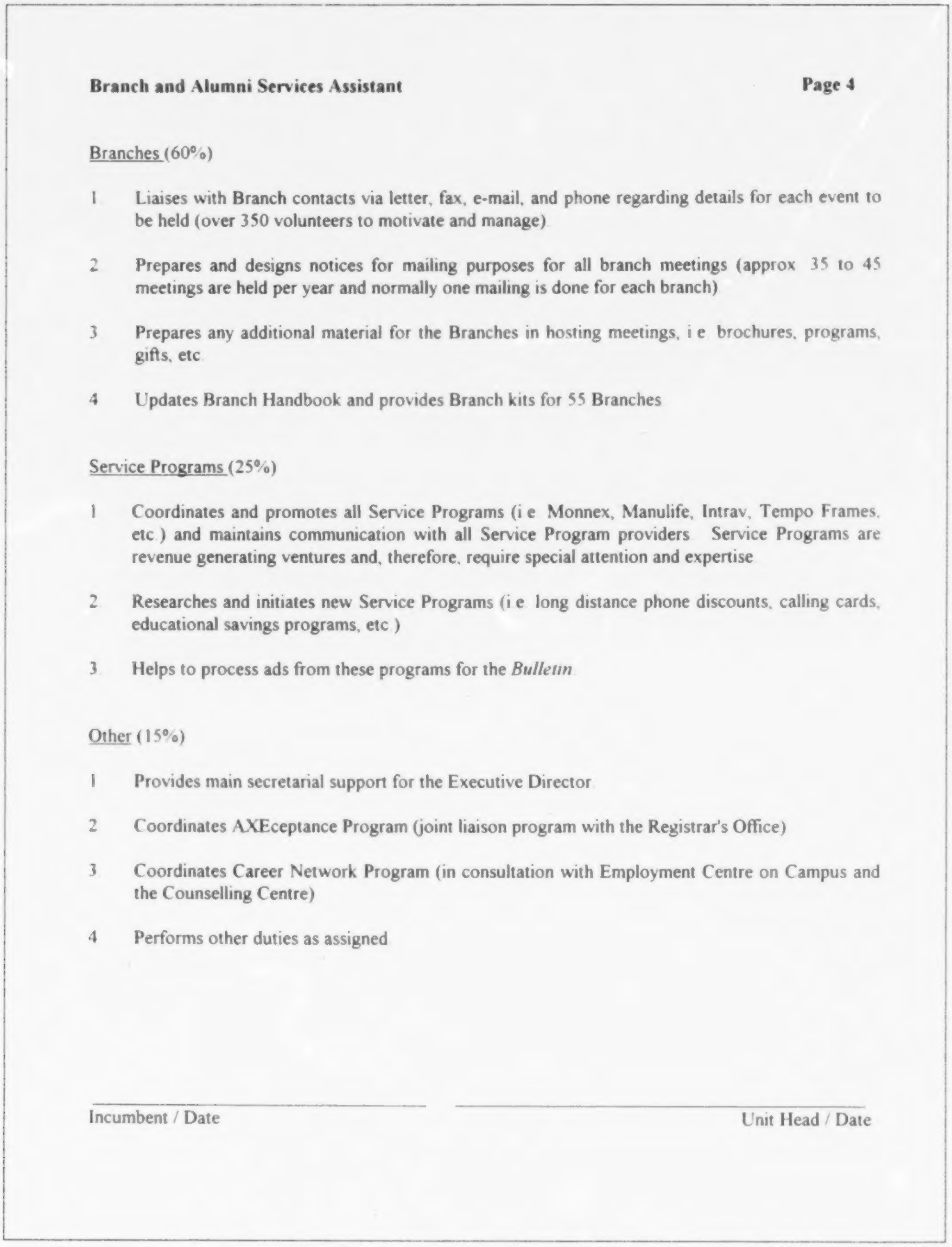
21. Researches material and completes questionnaires as required.

22. Works as a team member with the Manager, Reunions and Special Events to complete work for reunions and special events. Cross-training is part of the job.

23. Performs other duties as they relate to the ongoing work of the Alumni Office.

Continues

SAMPLE JOB DESCRIPTION
Branch and Alumni Services Assistant
ACADIA UNIVERSITY



Branch and Alumni Services Assistant **Page 4**

Branches (60%)

1 Liaises with Branch contacts via letter, fax, e-mail, and phone regarding details for each event to be held (over 350 volunteers to motivate and manage)

2 Prepares and designs notices for mailing purposes for all branch meetings (approx 35 to 45 meetings are held per year and normally one mailing is done for each branch)

3 Prepares any additional material for the Branches in hosting meetings, i e brochures, programs, gifts, etc

4 Updates Branch Handbook and provides Branch kits for 55 Branches

Service Programs (25%)

1 Coordinates and promotes all Service Programs (i e Monnex, Manulife, Intrav, Tempo Frames, etc) and maintains communication with all Service Program providers Service Programs are revenue generating ventures and, therefore, require special attention and expertise

2. Researches and initiates new Service Programs (i e long distance phone discounts, calling cards, educational savings programs, etc)

3. Helps to process ads from these programs for the *Bulletin*

Other (15%)

1 Provides main secretarial support for the Executive Director

2 Coordinates AXEceptance Program (joint liaison program with the Registrar's Office)

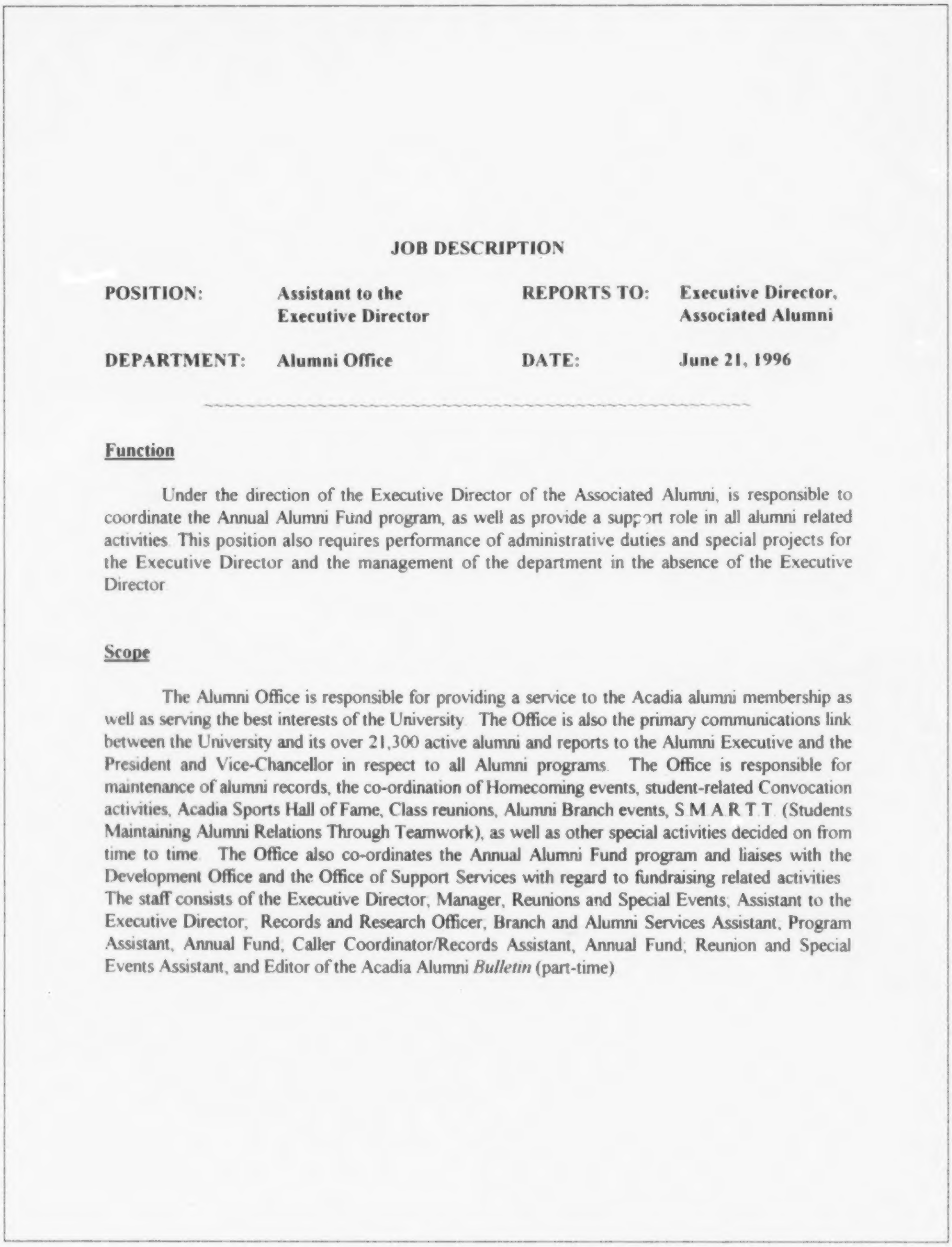
3 Coordinates Career Network Program (in consultation with Employment Centre on Campus and the Counselling Centre)

4 Performs other duties as assigned

Incumbent / Date

Unit Head / Date

SAMPLE JOB DESCRIPTION
Assistant to the Executive Director
ACADIA UNIVERSITY



JOB DESCRIPTION

POSITION:	**Assistant to the Executive Director**	REPORTS TO:	**Executive Director, Associated Alumni**
DEPARTMENT:	**Alumni Office**	DATE:	**June 21, 1996**

Function

Under the direction of the Executive Director of the Associated Alumni, is responsible to coordinate the Annual Alumni Fund program, as well as provide a support role in all alumni related activities. This position also requires performance of administrative duties and special projects for the Executive Director and the management of the department in the absence of the Executive Director.

Scope

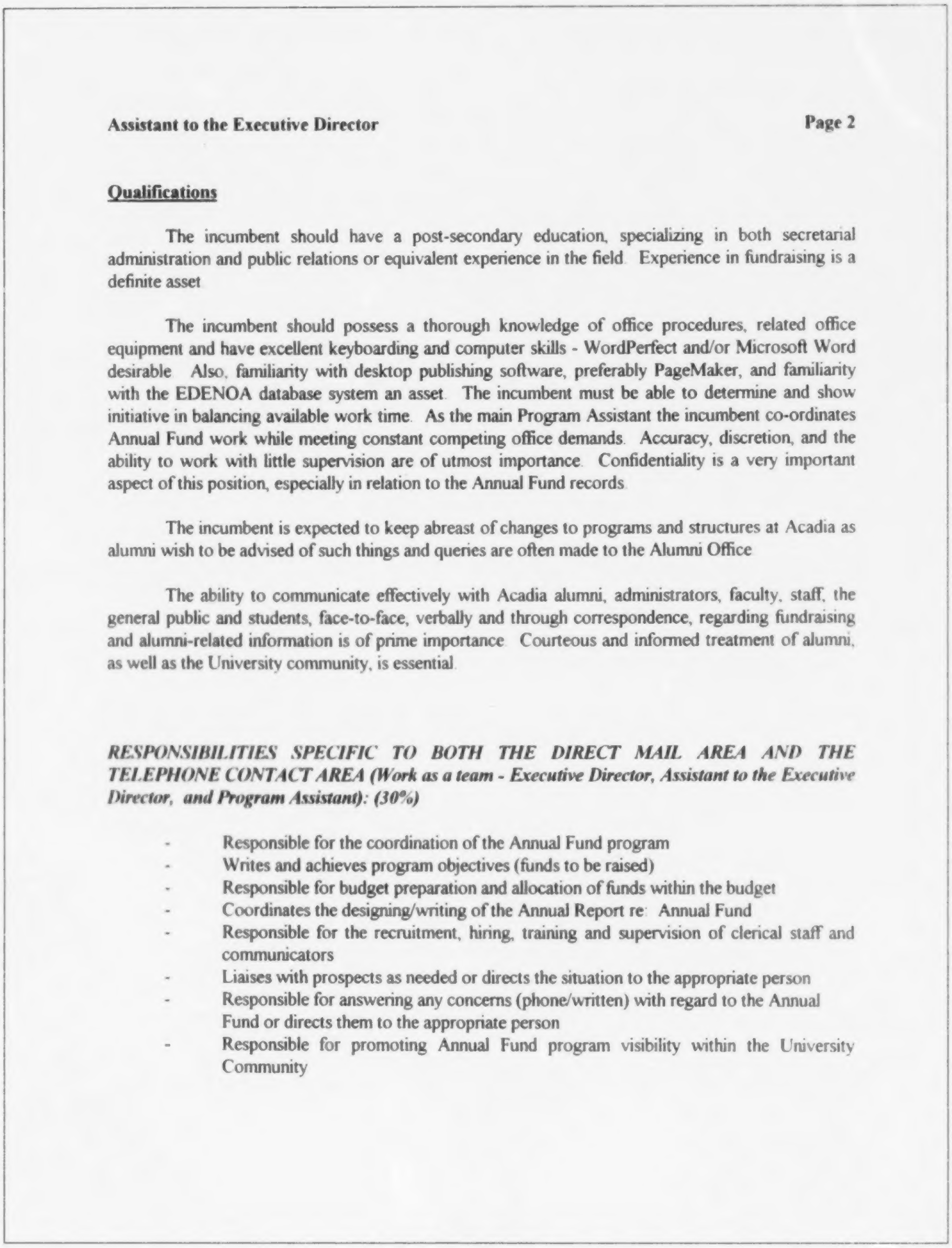
The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The Office is also the primary communications link between the University and its over 21,300 active alumni and reports to the Alumni Executive and the President and Vice-Chancellor in respect to all Alumni programs. The Office is responsible for maintenance of alumni records, the co-ordination of Homecoming events, student-related Convocation activities, Acadia Sports Hall of Fame, Class reunions, Alumni Branch events, S.M.A.R.T.T. (Students Maintaining Alumni Relations Through Teamwork), as well as other special activities decided on from time to time. The Office also co-ordinates the Annual Alumni Fund program and liaises with the Development Office and the Office of Support Services with regard to fundraising related activities. The staff consists of the Executive Director, Manager, Reunions and Special Events; Assistant to the Executive Director, Records and Research Officer, Branch and Alumni Services Assistant, Program Assistant, Annual Fund; Caller Coordinator/Records Assistant, Annual Fund; Reunion and Special Events Assistant, and Editor of the Acadia Alumni *Bulletin* (part-time).

Continues

SAMPLE JOB DESCRIPTION

Assistant to the Executive Director

ACADIA UNIVERSITY



Assistant to the Executive Director **Page 2**

Qualifications

The incumbent should have a post-secondary education, specializing in both secretarial administration and public relations or equivalent experience in the field. Experience in fundraising is a definite asset.

The incumbent should possess a thorough knowledge of office procedures, related office equipment and have excellent keyboarding and computer skills - WordPerfect and/or Microsoft Word desirable. Also, familiarity with desktop publishing software, preferably PageMaker, and familiarity with the EDENOA database system an asset. The incumbent must be able to determine and show initiative in balancing available work time. As the main Program Assistant the incumbent co-ordinates Annual Fund work while meeting constant competing office demands. Accuracy, discretion, and the ability to work with little supervision are of utmost importance. Confidentiality is a very important aspect of this position, especially in relation to the Annual Fund records.

The incumbent is expected to keep abreast of changes to programs and structures at Acadia as alumni wish to be advised of such things and queries are often made to the Alumni Office.

The ability to communicate effectively with Acadia alumni, administrators, faculty, staff, the general public and students, face-to-face, verbally and through correspondence, regarding fundraising and alumni-related information is of prime importance. Courteous and informed treatment of alumni, as well as the University community, is essential.

RESPONSIBILITIES SPECIFIC TO BOTH THE DIRECT MAIL AREA AND THE TELEPHONE CONTACT AREA (Work as a team - Executive Director, Assistant to the Executive Director, and Program Assistant): (30%)

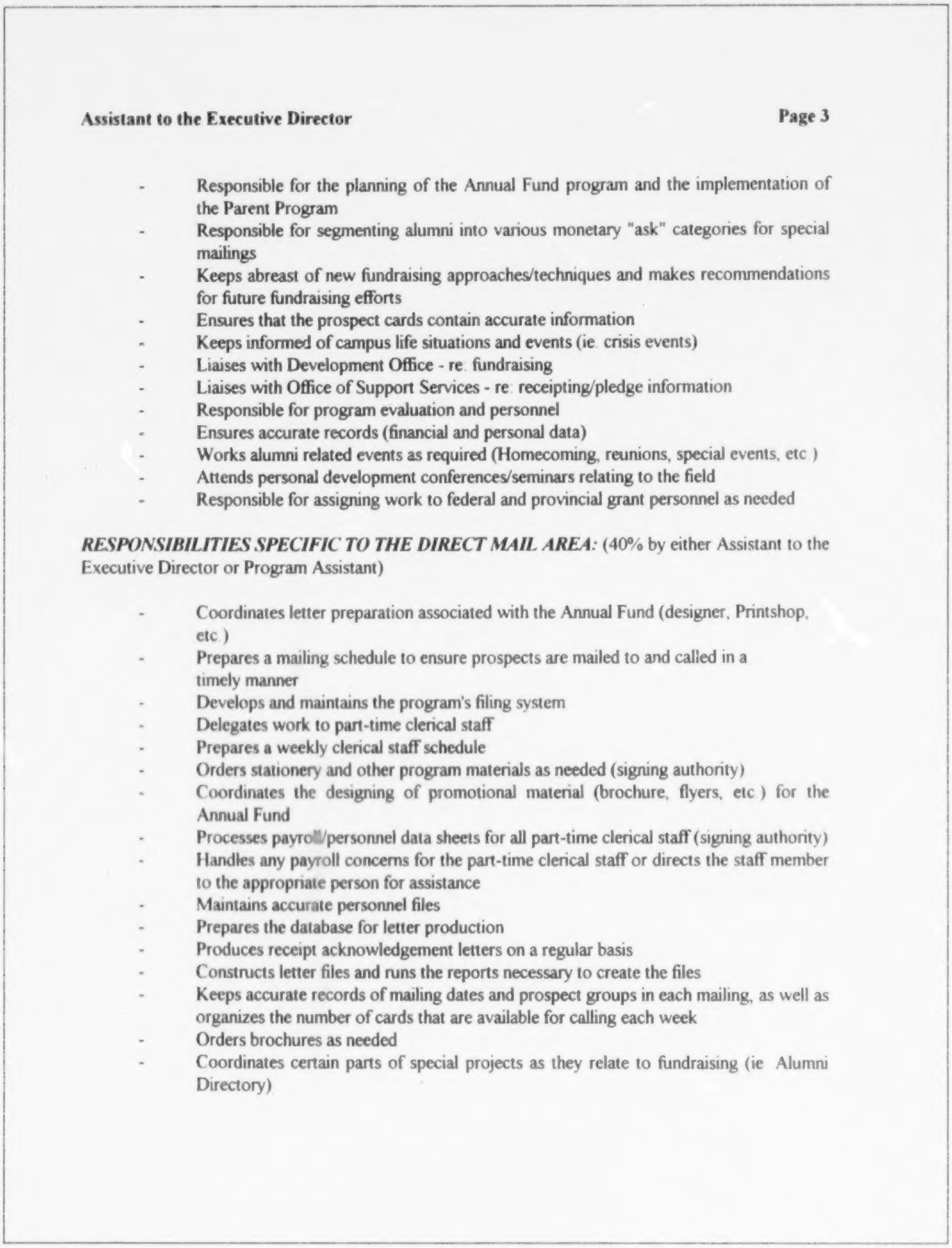
- Responsible for the coordination of the Annual Fund program
- Writes and achieves program objectives (funds to be raised)
- Responsible for budget preparation and allocation of funds within the budget
- Coordinates the designing/writing of the Annual Report re: Annual Fund
- Responsible for the recruitment, hiring, training and supervision of clerical staff and communicators
- Liaises with prospects as needed or directs the situation to the appropriate person
- Responsible for answering any concerns (phone/written) with regard to the Annual Fund or directs them to the appropriate person
- Responsible for promoting Annual Fund program visibility within the University Community

Continues

SAMPLE JOB DESCRIPTION

Assistant to the Executive Director

ACADIA UNIVERSITY



Assistant to the Executive Director **Page 3**

- Responsible for the planning of the Annual Fund program and the implementation of the Parent Program
- Responsible for segmenting alumni into various monetary "ask" categories for special mailings
- Keeps abreast of new fundraising approaches/techniques and makes recommendations for future fundraising efforts
- Ensures that the prospect cards contain accurate information
- Keeps informed of campus life situations and events (ie. crisis events)
- Liaises with Development Office - re: fundraising
- Liaises with Office of Support Services - re: receipting/pledge information
- Responsible for program evaluation and personnel
- Ensures accurate records (financial and personal data)
- Works alumni related events as required (Homecoming, reunions, special events, etc.)
- Attends personal development conferences/seminars relating to the field
- Responsible for assigning work to federal and provincial grant personnel as needed

RESPONSIBILITIES SPECIFIC TO THE DIRECT MAIL AREA: (40% by either Assistant to the Executive Director or Program Assistant)

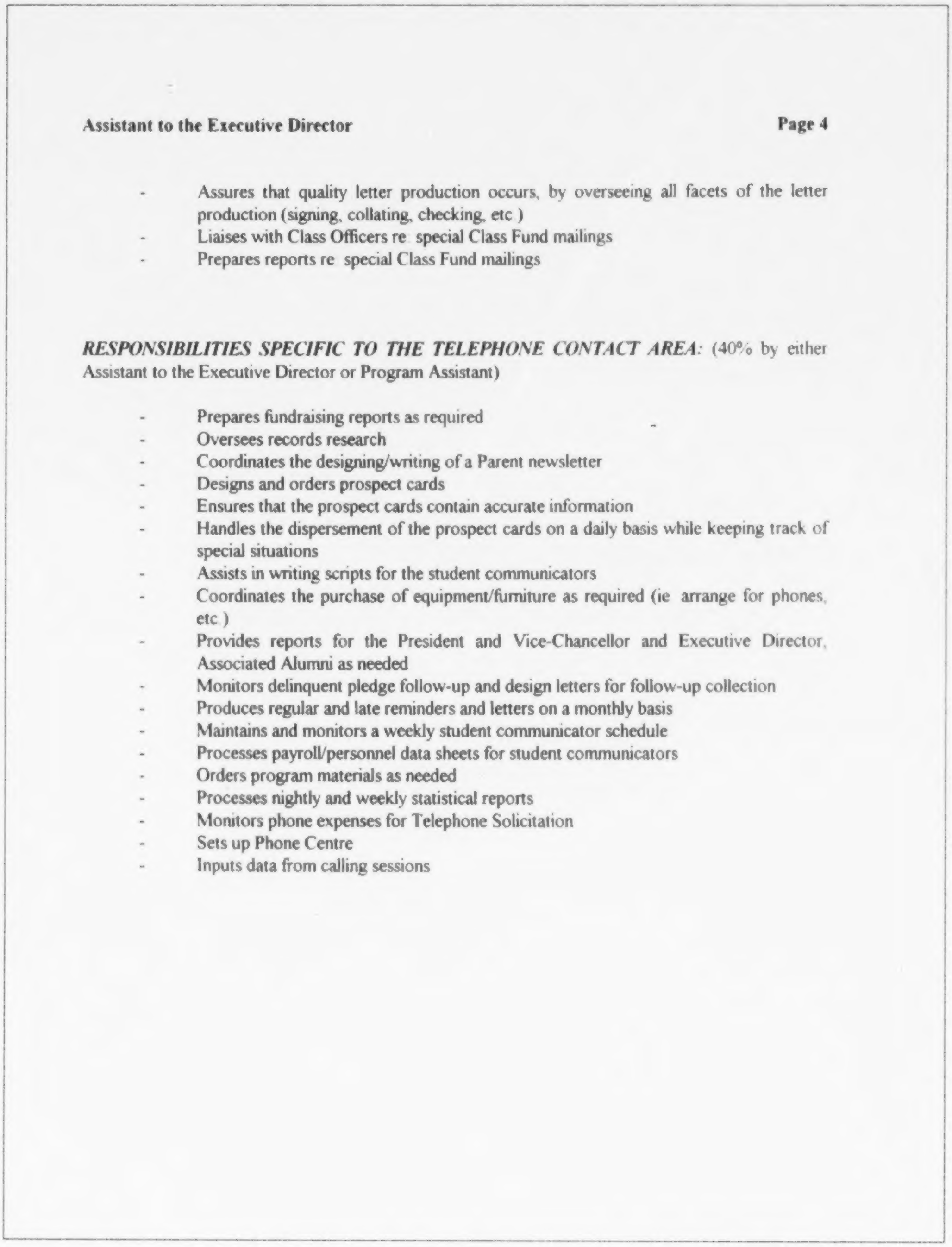
- Coordinates letter preparation associated with the Annual Fund (designer, Printshop, etc.)
- Prepares a mailing schedule to ensure prospects are mailed to and called in a timely manner
- Develops and maintains the program's filing system
- Delegates work to part-time clerical staff
- Prepares a weekly clerical staff schedule
- Orders stationery and other program materials as needed (signing authority)
- Coordinates the designing of promotional material (brochure, flyers, etc.) for the Annual Fund
- Processes payroll/personnel data sheets for all part-time clerical staff (signing authority)
- Handles any payroll concerns for the part-time clerical staff or directs the staff member to the appropriate person for assistance
- Maintains accurate personnel files
- Prepares the database for letter production
- Produces receipt acknowledgement letters on a regular basis
- Constructs letter files and runs the reports necessary to create the files
- Keeps accurate records of mailing dates and prospect groups in each mailing, as well as organizes the number of cards that are available for calling each week
- Orders brochures as needed
- Coordinates certain parts of special projects as they relate to fundraising (ie. Alumni Directory)

Continues

SAMPLE JOB DESCRIPTION

Assistant to the Executive Director

ACADIA UNIVERSITY



Assistant to the Executive Director **Page 4**

- Assures that quality letter production occurs, by overseeing all facets of the letter production (signing, collating, checking, etc.)
- Liaises with Class Officers re: special Class Fund mailings
- Prepares reports re: special Class Fund mailings

RESPONSIBILITIES SPECIFIC TO THE TELEPHONE CONTACT AREA: (40% by either Assistant to the Executive Director or Program Assistant)

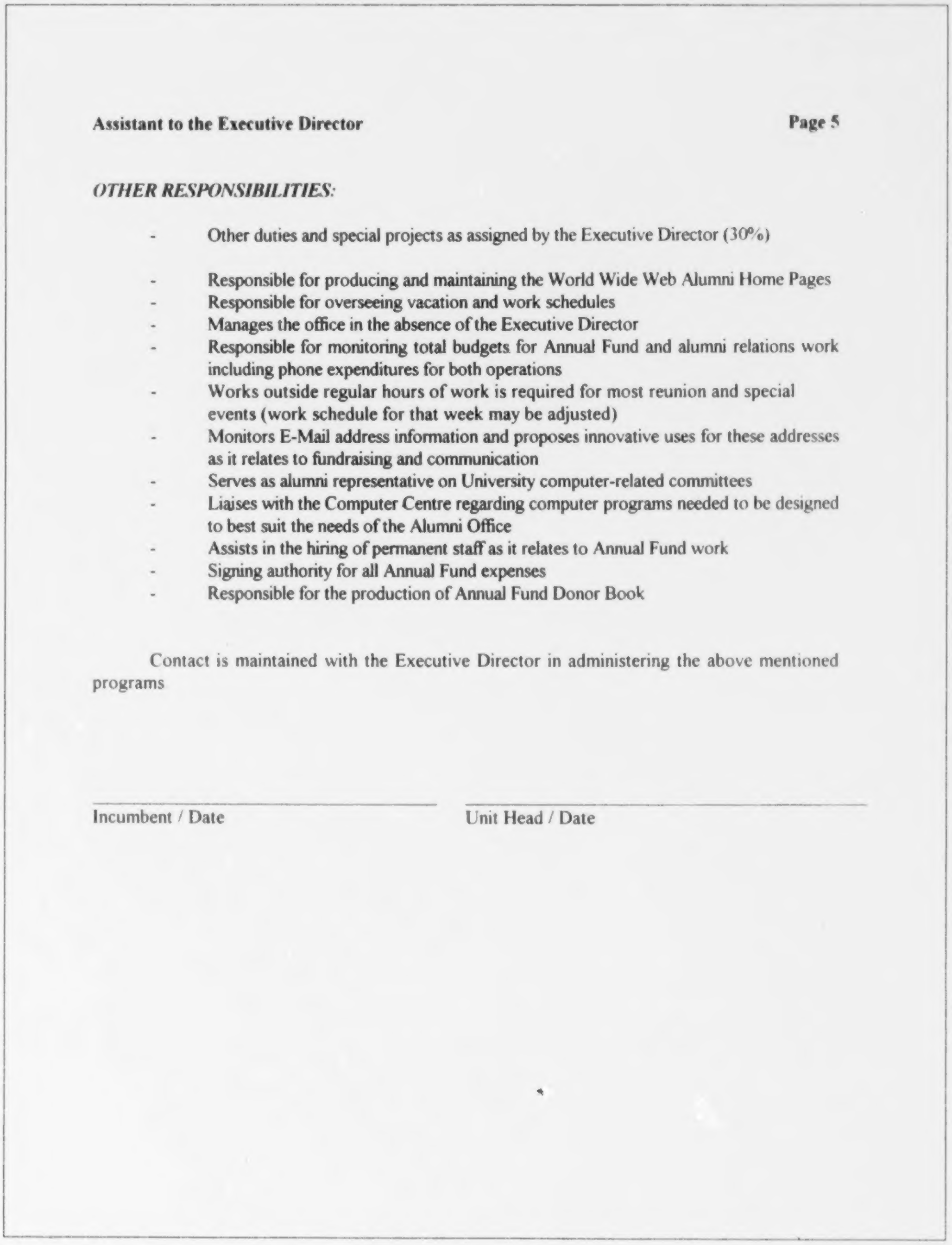
- Prepares fundraising reports as required
- Oversees records research
- Coordinates the designing/writing of a Parent newsletter
- Designs and orders prospect cards
- Ensures that the prospect cards contain accurate information
- Handles the dispersement of the prospect cards on a daily basis while keeping track of special situations
- Assists in writing scripts for the student communicators
- Coordinates the purchase of equipment/furniture as required (ie: arrange for phones, etc.)
- Provides reports for the President and Vice-Chancellor and Executive Director, Associated Alumni as needed
- Monitors delinquent pledge follow-up and design letters for follow-up collection
- Produces regular and late reminders and letters on a monthly basis
- Maintains and monitors a weekly student communicator schedule
- Processes payroll/personnel data sheets for student communicators
- Orders program materials as needed
- Processes nightly and weekly statistical reports
- Monitors phone expenses for Telephone Solicitation
- Sets up Phone Centre
- Inputs data from calling sessions

Continues

SAMPLE JOB DESCRIPTION

Assistant to the Executive Director

ACADIA UNIVERSITY



Assistant to the Executive Director **Page 5**

OTHER RESPONSIBILITIES:

- Other duties and special projects as assigned by the Executive Director (30%)

- Responsible for producing and maintaining the World Wide Web Alumni Home Pages
- Responsible for overseeing vacation and work schedules
- Manages the office in the absence of the Executive Director
- Responsible for monitoring total budgets for Annual Fund and alumni relations work including phone expenditures for both operations
- Works outside regular hours of work is required for most reunion and special events (work schedule for that week may be adjusted)
- Monitors E-Mail address information and proposes innovative uses for these addresses as it relates to fundraising and communication
- Serves as alumni representative on University computer-related committees
- Liaises with the Computer Centre regarding computer programs needed to be designed to best suit the needs of the Alumni Office
- Assists in the hiring of permanent staff as it relates to Annual Fund work
- Signing authority for all Annual Fund expenses
- Responsible for the production of Annual Fund Donor Book

Contact is maintained with the Executive Director in administering the above mentioned programs

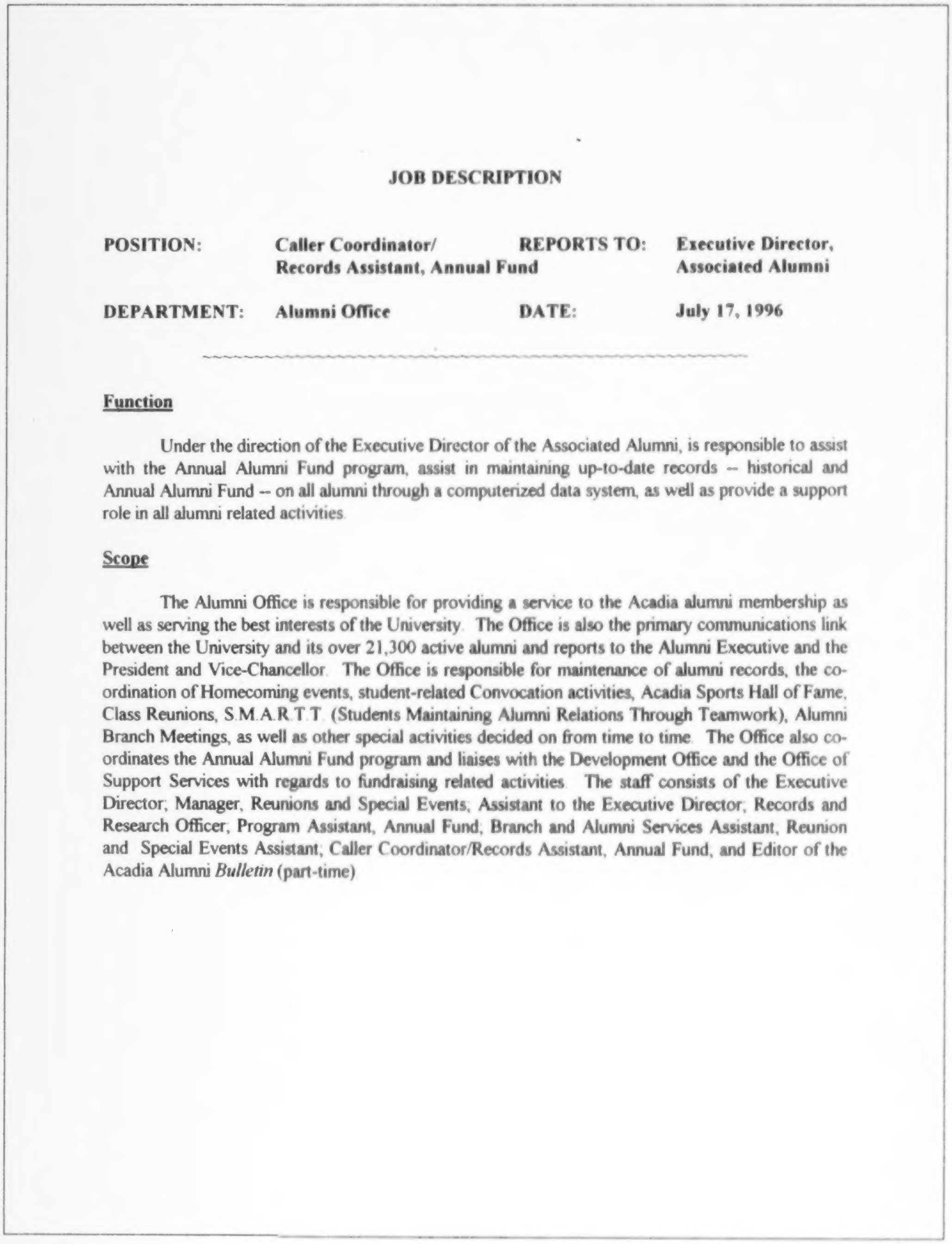
Incumbent / Date

Unit Head / Date

SAMPLE JOB DESCRIPTION

Caller Coordinator/Records Assistant, Annual Fund

ACADIA UNIVERSITY



JOB DESCRIPTION

POSITION:	**Caller Coordinator/ Records Assistant, Annual Fund**	**REPORTS TO:**	**Executive Director, Associated Alumni**
DEPARTMENT:	**Alumni Office**	**DATE:**	**July 17, 1996**

Function

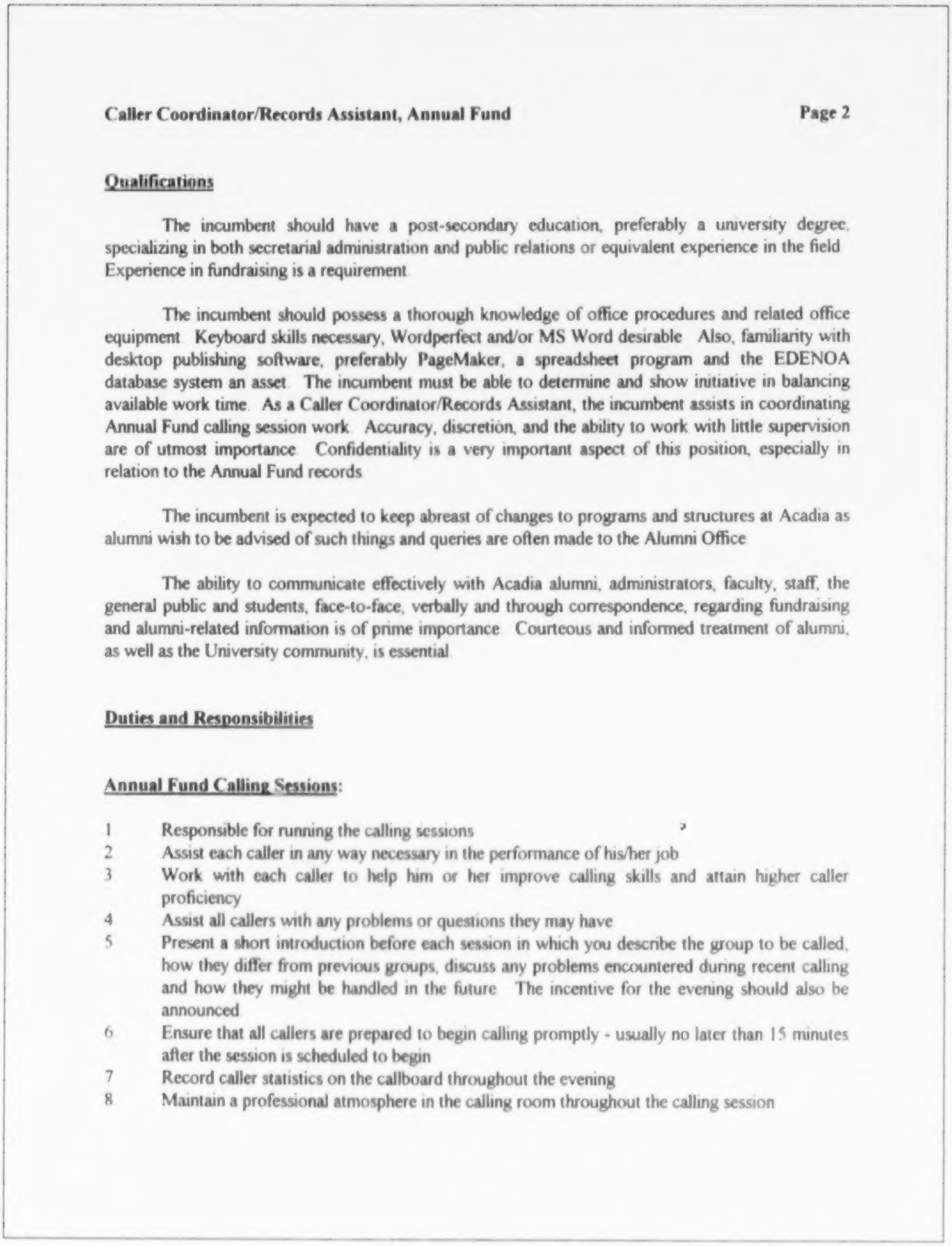
Under the direction of the Executive Director of the Associated Alumni, is responsible to assist with the Annual Alumni Fund program, assist in maintaining up-to-date records -- historical and Annual Alumni Fund -- on all alumni through a computerized data system, as well as provide a support role in all alumni related activities.

Scope

The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The Office is also the primary communications link between the University and its over 21,300 active alumni and reports to the Alumni Executive and the President and Vice-Chancellor. The Office is responsible for maintenance of alumni records, the co-ordination of Homecoming events, student-related Convocation activities, Acadia Sports Hall of Fame, Class Reunions, S.M.A.R.T.T. (Students Maintaining Alumni Relations Through Teamwork), Alumni Branch Meetings, as well as other special activities decided on from time to time. The Office also co-ordinates the Annual Alumni Fund program and liaises with the Development Office and the Office of Support Services with regards to fundraising related activities. The staff consists of the Executive Director; Manager, Reunions and Special Events; Assistant to the Executive Director; Records and Research Officer; Program Assistant, Annual Fund; Branch and Alumni Services Assistant; Reunion and Special Events Assistant; Caller Coordinator/Records Assistant, Annual Fund, and Editor of the Acadia Alumni *Bulletin* (part-time).

Continues

SAMPLE JOB DESCRIPTION
Caller Coordinator/Records Assistant, Annual Fund
ACADIA UNIVERSITY



Caller Coordinator/Records Assistant, Annual Fund **Page 2**

Qualifications

The incumbent should have a post-secondary education, preferably a university degree, specializing in both secretarial administration and public relations or equivalent experience in the field. Experience in fundraising is a requirement.

The incumbent should possess a thorough knowledge of office procedures and related office equipment. Keyboard skills necessary, Wordperfect and/or MS Word desirable. Also, familiarity with desktop publishing software, preferably PageMaker, a spreadsheet program and the EDENOA database system an asset. The incumbent must be able to determine and show initiative in balancing available work time. As a Caller Coordinator/Records Assistant, the incumbent assists in coordinating Annual Fund calling session work. Accuracy, discretion, and the ability to work with little supervision are of utmost importance. Confidentiality is a very important aspect of this position, especially in relation to the Annual Fund records.

The incumbent is expected to keep abreast of changes to programs and structures at Acadia as alumni wish to be advised of such things and queries are often made to the Alumni Office.

The ability to communicate effectively with Acadia alumni, administrators, faculty, staff, the general public and students, face-to-face, verbally and through correspondence, regarding fundraising and alumni-related information is of prime importance. Courteous and informed treatment of alumni, as well as the University community, is essential.

Duties and Responsibilities

Annual Fund Calling Sessions:

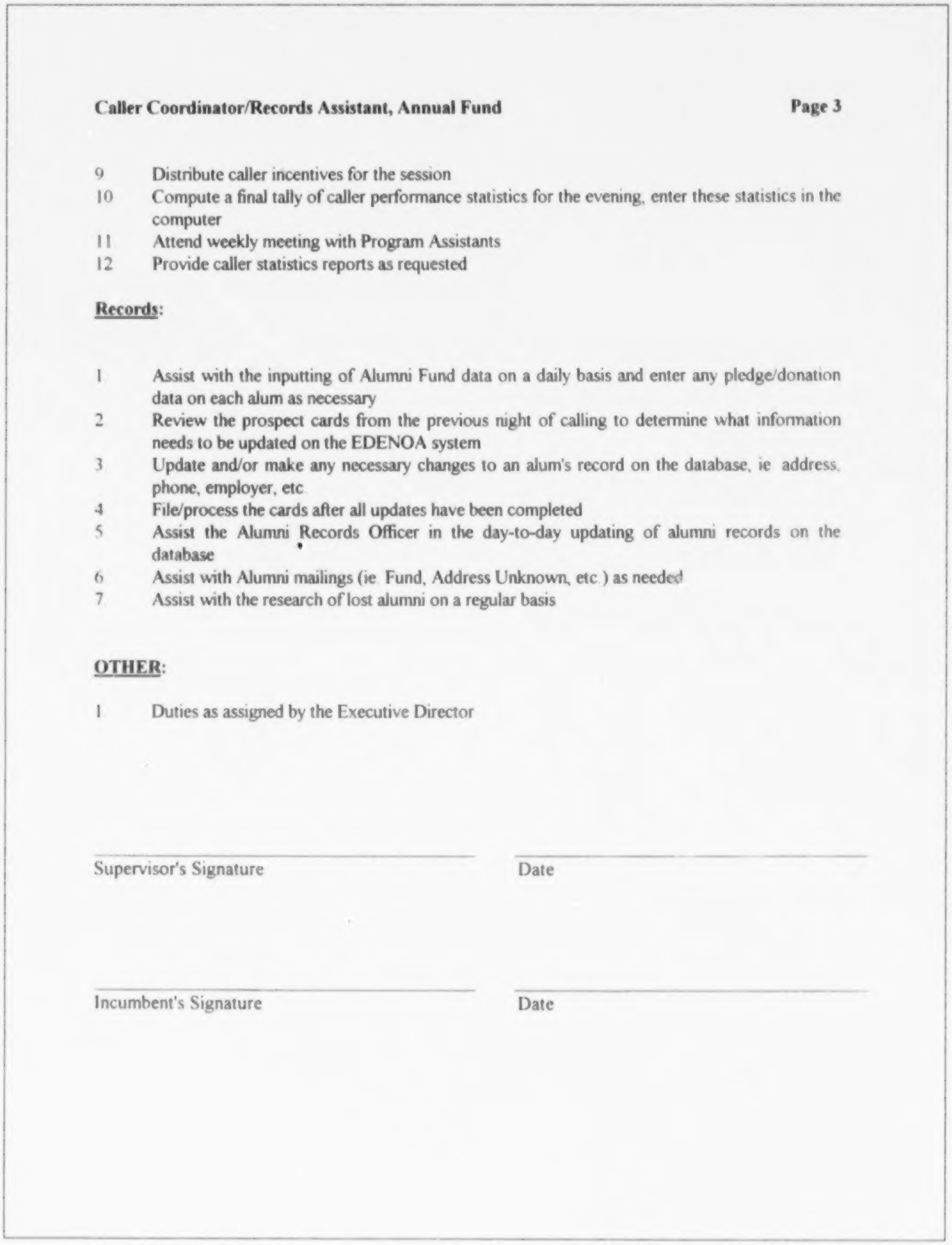
1. Responsible for running the calling sessions.
2. Assist each caller in any way necessary in the performance of his/her job.
3. Work with each caller to help him or her improve calling skills and attain higher caller proficiency.
4. Assist all callers with any problems or questions they may have.
5. Present a short introduction before each session in which you describe the group to be called, how they differ from previous groups, discuss any problems encountered during recent calling and how they might be handled in the future. The incentive for the evening should also be announced.
6. Ensure that all callers are prepared to begin calling promptly - usually no later than 15 minutes after the session is scheduled to begin.
7. Record caller statistics on the callboard throughout the evening.
8. Maintain a professional atmosphere in the calling room throughout the calling session.

Continues

SAMPLE JOB DESCRIPTION

Caller Coordinator/Records Assistant, Annual Fund

ACADIA UNIVERSITY



Caller Coordinator/Records Assistant, Annual Fund **Page 3**

9 Distribute caller incentives for the session
10 Compute a final tally of caller performance statistics for the evening, enter these statistics in the computer
11 Attend weekly meeting with Program Assistants
12 Provide caller statistics reports as requested

Records:

1 Assist with the inputting of Alumni Fund data on a daily basis and enter any pledge/donation data on each alum as necessary
2 Review the prospect cards from the previous night of calling to determine what information needs to be updated on the EDENOA system
3 Update and/or make any necessary changes to an alum's record on the database, ie address, phone, employer, etc
4 File/process the cards after all updates have been completed
5 Assist the Alumni Records Officer in the day-to-day updating of alumni records on the database
6 Assist with Alumni mailings (ie Fund, Address Unknown, etc) as needed
7 Assist with the research of lost alumni on a regular basis

OTHER:

1 Duties as assigned by the Executive Director

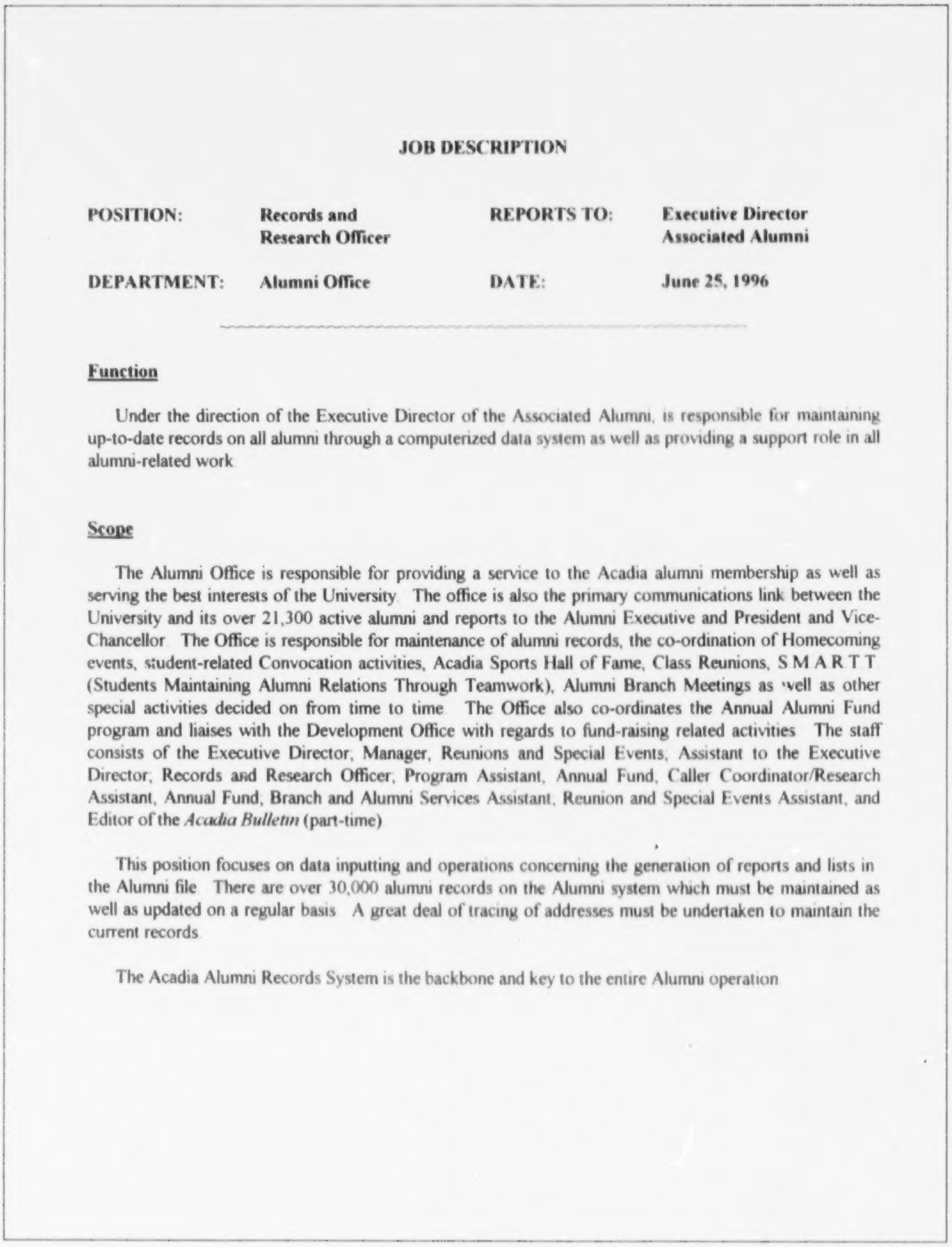
Supervisor's Signature ____________ Date ____________

Incumbent's Signature ____________ Date ____________

SAMPLE JOB DESCRIPTION

Records and Research Officer

ACADIA UNIVERSITY



JOB DESCRIPTION

POSITION:	**Records and Research Officer**	**REPORTS TO:**	**Executive Director Associated Alumni**
DEPARTMENT:	**Alumni Office**	**DATE:**	**June 25, 1996**

Function

Under the direction of the Executive Director of the Associated Alumni, is responsible for maintaining up-to-date records on all alumni through a computerized data system as well as providing a support role in all alumni-related work.

Scope

The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The office is also the primary communications link between the University and its over 21,300 active alumni and reports to the Alumni Executive and President and Vice-Chancellor. The Office is responsible for maintenance of alumni records, the co-ordination of Homecoming events, student-related Convocation activities, Acadia Sports Hall of Fame, Class Reunions, S.M.A.R.T.T. (Students Maintaining Alumni Relations Through Teamwork), Alumni Branch Meetings as well as other special activities decided on from time to time. The Office also co-ordinates the Annual Alumni Fund program and liaises with the Development Office with regards to fund-raising related activities. The staff consists of the Executive Director; Manager, Reunions and Special Events; Assistant to the Executive Director; Records and Research Officer; Program Assistant, Annual Fund; Caller Coordinator/Research Assistant, Annual Fund; Branch and Alumni Services Assistant; Reunion and Special Events Assistant; and Editor of the *Acadia Bulletin* (part-time).

This position focuses on data inputting and operations concerning the generation of reports and lists in the Alumni file. There are over 30,000 alumni records on the Alumni system which must be maintained as well as updated on a regular basis. A great deal of tracing of addresses must be undertaken to maintain the current records.

The Acadia Alumni Records System is the backbone and key to the entire Alumni operation.

Continues

SAMPLE JOB DESCRIPTION

Records and Research Officer

ACADIA UNIVERSITY

Records and Research Officer Page 2

Qualifications

The incumbent should have a post-secondary education, specializing in secretarial administration or equivalent experience in the field.

The incumbent should possess a knowledge of a computer records system and be skilled in operating a terminal. Accuracy, discretion, and the ability to work with little supervision are of utmost importance. Confidentiality is a very important aspect of this position, especially in relation to the Fund records and the general Alumni records. The incumbent must be able to determine and show initiative in balancing available work time against often competing demands.

The incumbent is expected to keep abreast of changes to programs and structures at Acadia as alumni wish to be advised of such things and queries are often made to the Alumni Office.

The ability to communicate effectively with Acadia alumni, administrators, faculty, staff, the general public, and students face-to-face, verbally and through correspondence regarding alumni-related information is of prime importance. Courteous and informed treatment of alumni, as well as the University community, is essential.

Duties and Responsibilities

Records/Research (45%)

1. Familiarity with a computer is required as well as competence in using EDENOA database and Microsoft Word. The incumbent must be knowledgeable with the Alumni system, recognize problems, make possible changes and co-ordinate all system modifications with the system analyst in the Computer Centre.

2. Collects, codes and enters into the Alumni system data concerning each alumnus through the operation of an on-line method.

3. Compiles and produces pertinent data, class lists, geographical lists, labels and other statistical information to both internal users and to external agencies. Ensures that the data is kept current and accurately updated as required. Composes correspondence as required.

4. Performs a tracing function to locate lost alumni by referring to the Master Directory, contacting parents, searching phone books from various areas, referring to records of alumni at Acadia and old student files kept in the Registrar's Office and Archives.

5. Assists with on-the-job training of various part-time and summer staff who work in the Alumni Office.

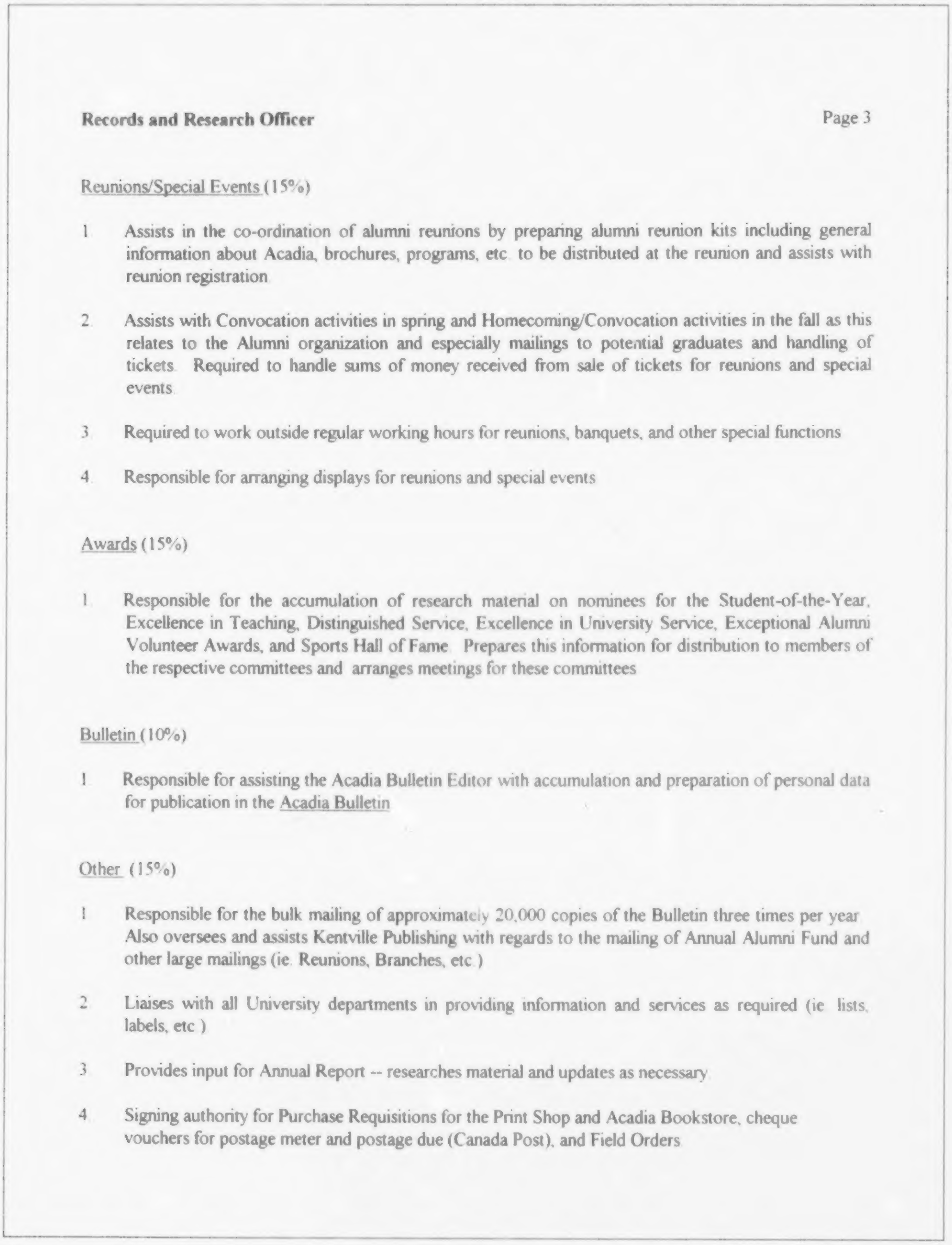
6. Maintains an alumni mailing list and generates appropriate labels for In-House mailings as required by the Department of Public Affairs.

Continues

SAMPLE JOB DESCRIPTION

Records and Research Officer

ACADIA UNIVERSITY



Records and Research Officer Page 3

Reunions/Special Events (15%)

1. Assists in the co-ordination of alumni reunions by preparing alumni reunion kits including general information about Acadia, brochures, programs, etc. to be distributed at the reunion and assists with reunion registration.
2. Assists with Convocation activities in spring and Homecoming/Convocation activities in the fall as this relates to the Alumni organization and especially mailings to potential graduates and handling of tickets. Required to handle sums of money received from sale of tickets for reunions and special events.
3. Required to work outside regular working hours for reunions, banquets, and other special functions.
4. Responsible for arranging displays for reunions and special events.

Awards (15%)

1. Responsible for the accumulation of research material on nominees for the Student-of-the-Year, Excellence in Teaching, Distinguished Service, Excellence in University Service, Exceptional Alumni Volunteer Awards, and Sports Hall of Fame. Prepares this information for distribution to members of the respective committees and arranges meetings for these committees.

Bulletin (10%)

1. Responsible for assisting the Acadia Bulletin Editor with accumulation and preparation of personal data for publication in the Acadia Bulletin.

Other (15%)

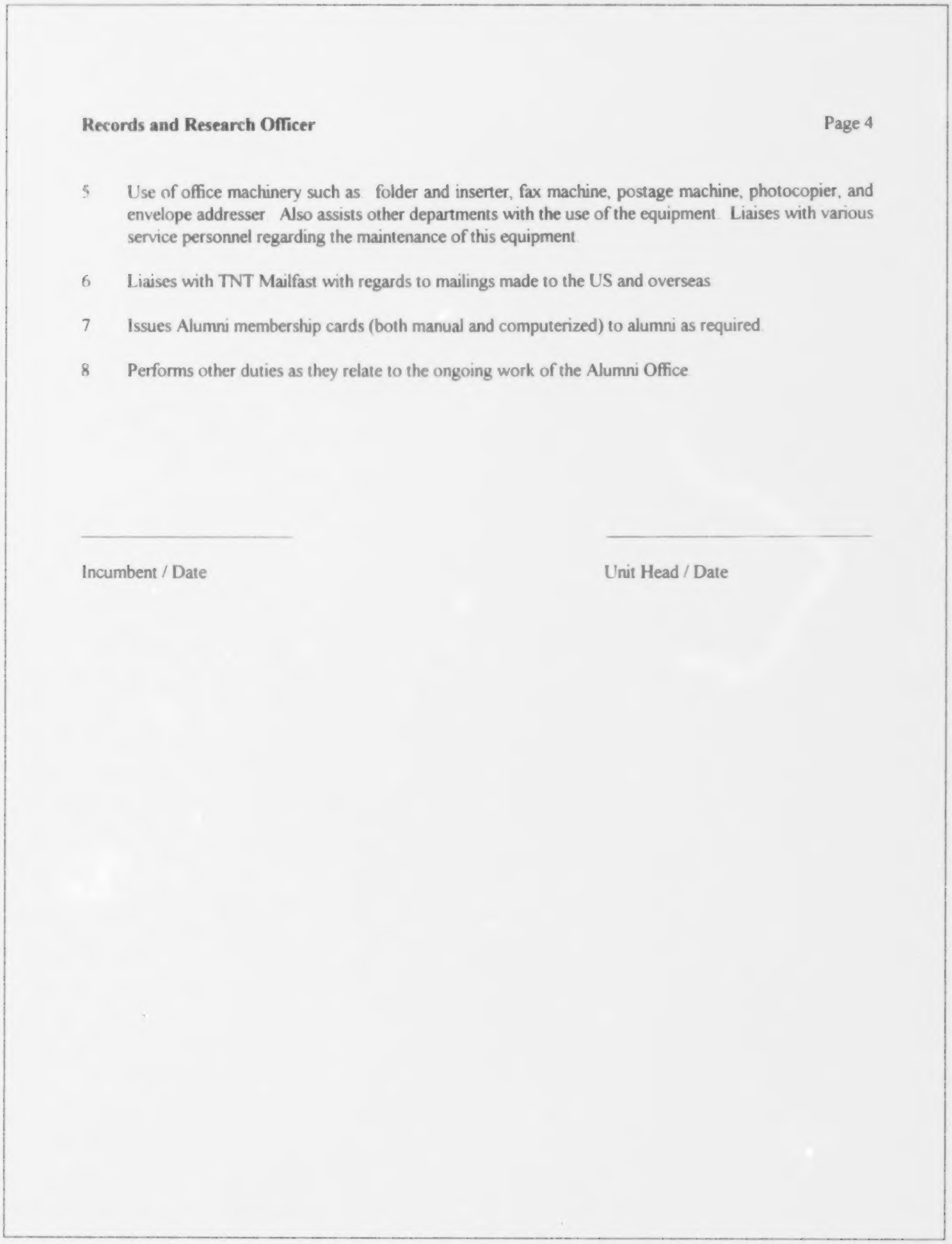
1. Responsible for the bulk mailing of approximately 20,000 copies of the Bulletin three times per year. Also oversees and assists Kentville Publishing with regards to the mailing of Annual Alumni Fund and other large mailings (ie. Reunions, Branches, etc.)
2. Liaises with all University departments in providing information and services as required (ie. lists, labels, etc.)
3. Provides input for Annual Report -- researches material and updates as necessary.
4. Signing authority for Purchase Requisitions for the Print Shop and Acadia Bookstore, cheque vouchers for postage meter and postage due (Canada Post), and Field Orders.

Continues

SAMPLE JOB DESCRIPTION

Records and Research Officer

ACADIA UNIVERSITY



Records and Research Officer Page 4

5 Use of office machinery such as folder and inserter, fax machine, postage machine, photocopier, and envelope addresser. Also assists other departments with the use of the equipment. Liaises with various service personnel regarding the maintenance of this equipment.

6 Liaises with TNT Mailfast with regards to mailings made to the US and overseas.

7 Issues Alumni membership cards (both manual and computerized) to alumni as required.

8 Performs other duties as they relate to the ongoing work of the Alumni Office.

Incumbent / Date

Unit Head / Date

SAMPLE JOB DESCRIPTION

Program Assistant, Annual Fund

ACADIA UNIVERSITY

JOB DESCRIPTION

POSITION:	**Program Assistant, Annual Fund**	**REPORTS TO:**	**Executive Director, Associated Alumni**
DEPARTMENT:	**Alumni Office**	**DATE:**	**July 10, 1996**

Function

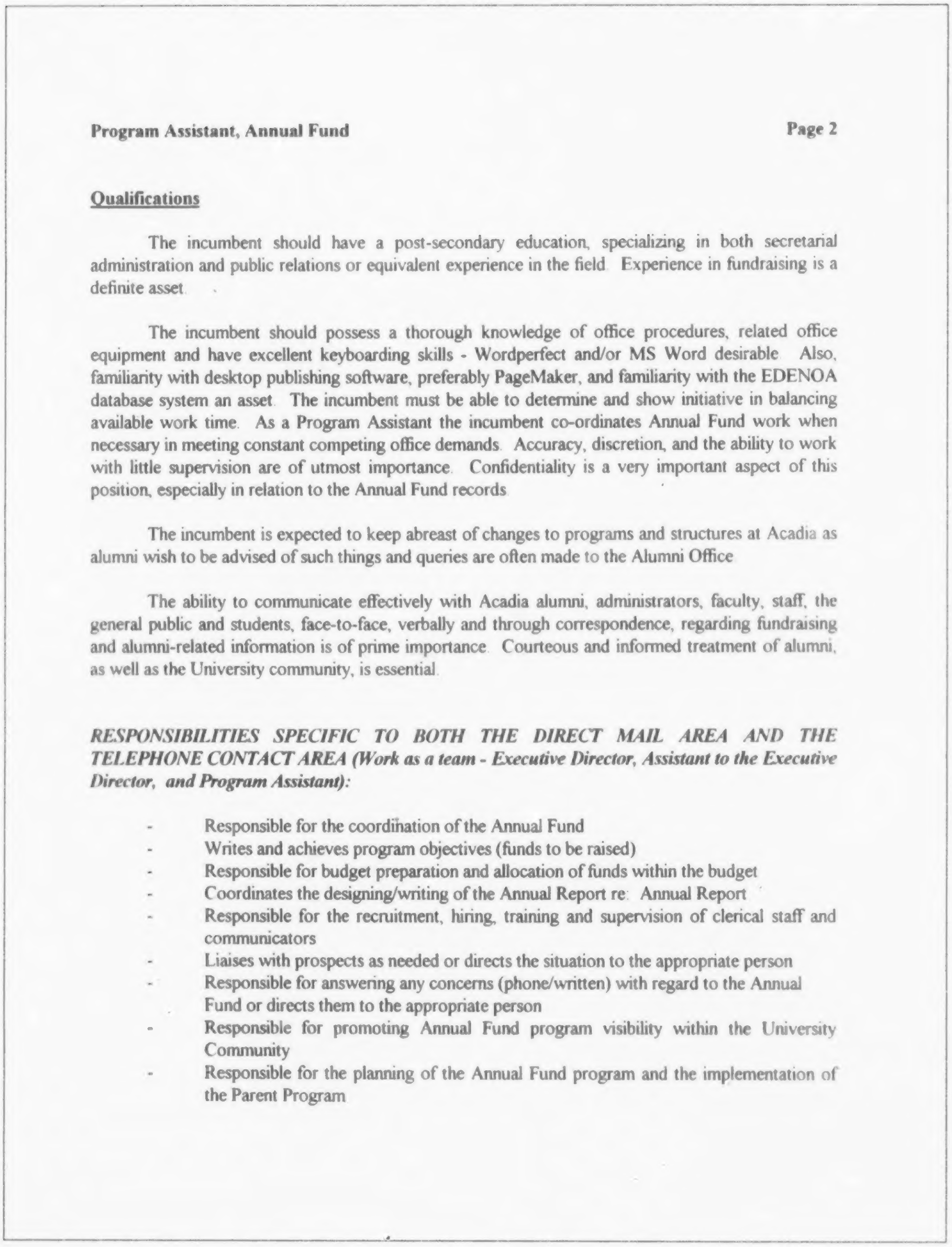
Under the direction of the Executive Director of the Associated Alumni, is responsible to assist with the Annual Alumni Fund program, as well as provide a support role in all alumni related activities. This position also requires performance of administrative duties for the Executive Director and occasionally for some of the other members of the Alumni Office staff.

Scope

The Alumni Office is responsible for providing a service to the Acadia alumni membership as well as serving the best interests of the University. The Office is also the primary communications link between the University and its over 21,300 active alumni. The Office is responsible for maintenance of alumni records, the co-ordination of Homecoming events, student-related Convocation activities, Acadia Sports Hall of Fame, Class Reunions, Alumni Branch Meetings, S.M.A.R.T.T. (Students Maintaining as well as other special activities decided on from time to time. The Office also co-ordinates the Annual Alumni Fund program and liaises with the Development Office and the Office of Support Services with regard to fundraising related activities. The staff consists of the Executive Director, Manager, Reunions and Special Events; Assistant to the Executive Director; Records and Research Officer; Branch and Alumni Services Assistant; Program Assistant, Annual Fund; Caller Coordinator/Records Assistant, Annual Fund; and Editor of the Acadia Alumni *Bulletin* (part-time). The membership increases by over 800 each year.

Continues

SAMPLE JOB DESCRIPTION
Program Assistant, Annual Fund
ACADIA UNIVERSITY



Program Assistant, Annual Fund **Page 2**

Qualifications

The incumbent should have a post-secondary education, specializing in both secretarial administration and public relations or equivalent experience in the field. Experience in fundraising is a definite asset.

The incumbent should possess a thorough knowledge of office procedures, related office equipment and have excellent keyboarding skills - Wordperfect and/or MS Word desirable. Also, familiarity with desktop publishing software, preferably PageMaker, and familiarity with the EDENOA database system an asset. The incumbent must be able to determine and show initiative in balancing available work time. As a Program Assistant the incumbent co-ordinates Annual Fund work when necessary in meeting constant competing office demands. Accuracy, discretion, and the ability to work with little supervision are of utmost importance. Confidentiality is a very important aspect of this position, especially in relation to the Annual Fund records.

The incumbent is expected to keep abreast of changes to programs and structures at Acadia as alumni wish to be advised of such things and queries are often made to the Alumni Office.

The ability to communicate effectively with Acadia alumni, administrators, faculty, staff, the general public and students, face-to-face, verbally and through correspondence, regarding fundraising and alumni-related information is of prime importance. Courteous and informed treatment of alumni, as well as the University community, is essential.

RESPONSIBILITIES SPECIFIC TO BOTH THE DIRECT MAIL AREA AND THE TELEPHONE CONTACT AREA (Work as a team - Executive Director, Assistant to the Executive Director, and Program Assistant):

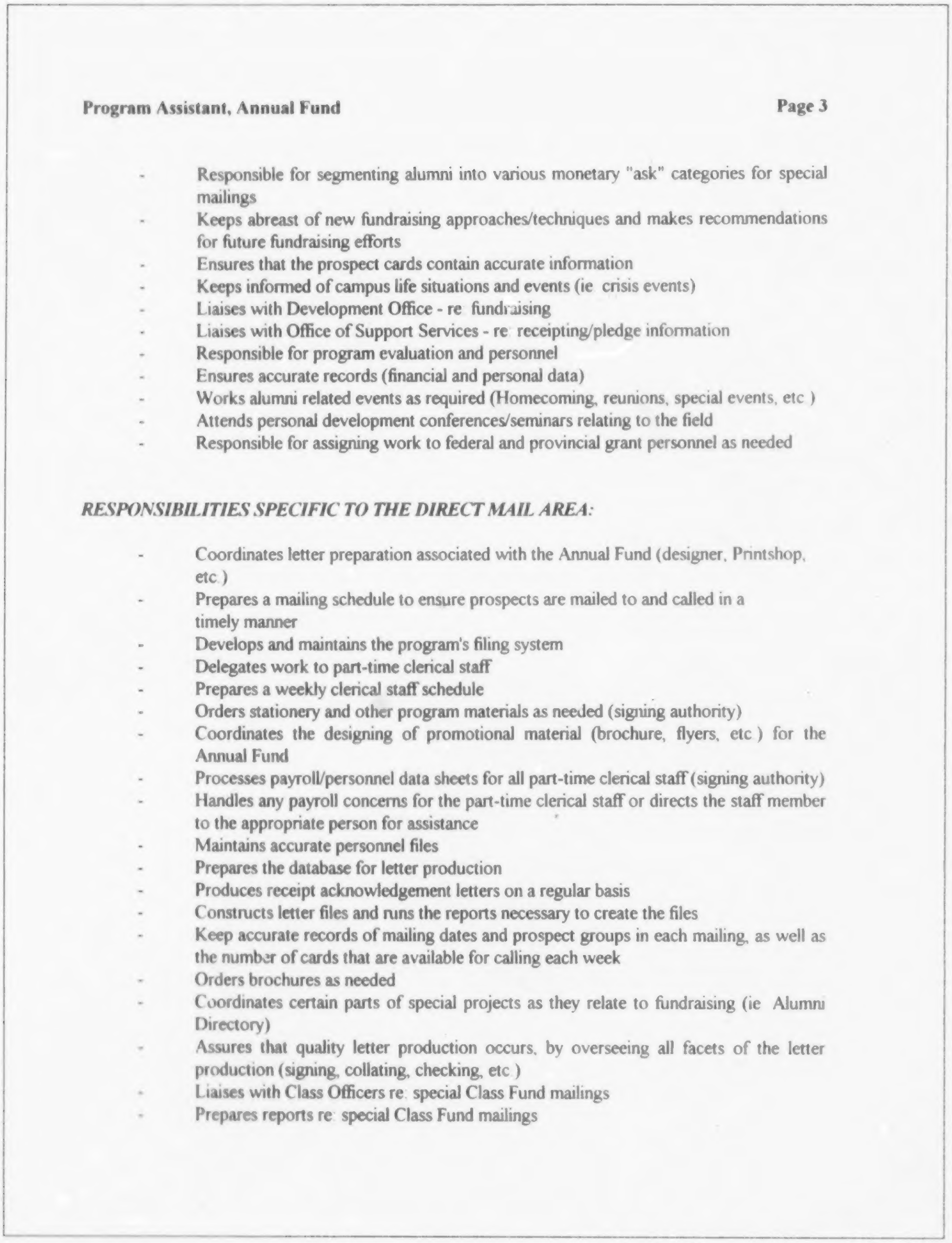
- Responsible for the coordination of the Annual Fund
- Writes and achieves program objectives (funds to be raised)
- Responsible for budget preparation and allocation of funds within the budget
- Coordinates the designing/writing of the Annual Report re: Annual Report
- Responsible for the recruitment, hiring, training and supervision of clerical staff and communicators
- Liaises with prospects as needed or directs the situation to the appropriate person
- Responsible for answering any concerns (phone/written) with regard to the Annual Fund or directs them to the appropriate person
- Responsible for promoting Annual Fund program visibility within the University Community
- Responsible for the planning of the Annual Fund program and the implementation of the Parent Program

Continues

SAMPLE JOB DESCRIPTION

Program Assistant, Annual Fund

ACADIA UNIVERSITY



Program Assistant, Annual Fund **Page 3**

- Responsible for segmenting alumni into various monetary "ask" categories for special mailings
- Keeps abreast of new fundraising approaches/techniques and makes recommendations for future fundraising efforts
- Ensures that the prospect cards contain accurate information
- Keeps informed of campus life situations and events (ie crisis events)
- Liaises with Development Office - re fundraising
- Liaises with Office of Support Services - re receipting/pledge information
- Responsible for program evaluation and personnel
- Ensures accurate records (financial and personal data)
- Works alumni related events as required (Homecoming, reunions, special events, etc)
- Attends personal development conferences/seminars relating to the field
- Responsible for assigning work to federal and provincial grant personnel as needed

RESPONSIBILITIES SPECIFIC TO THE DIRECT MAIL AREA:

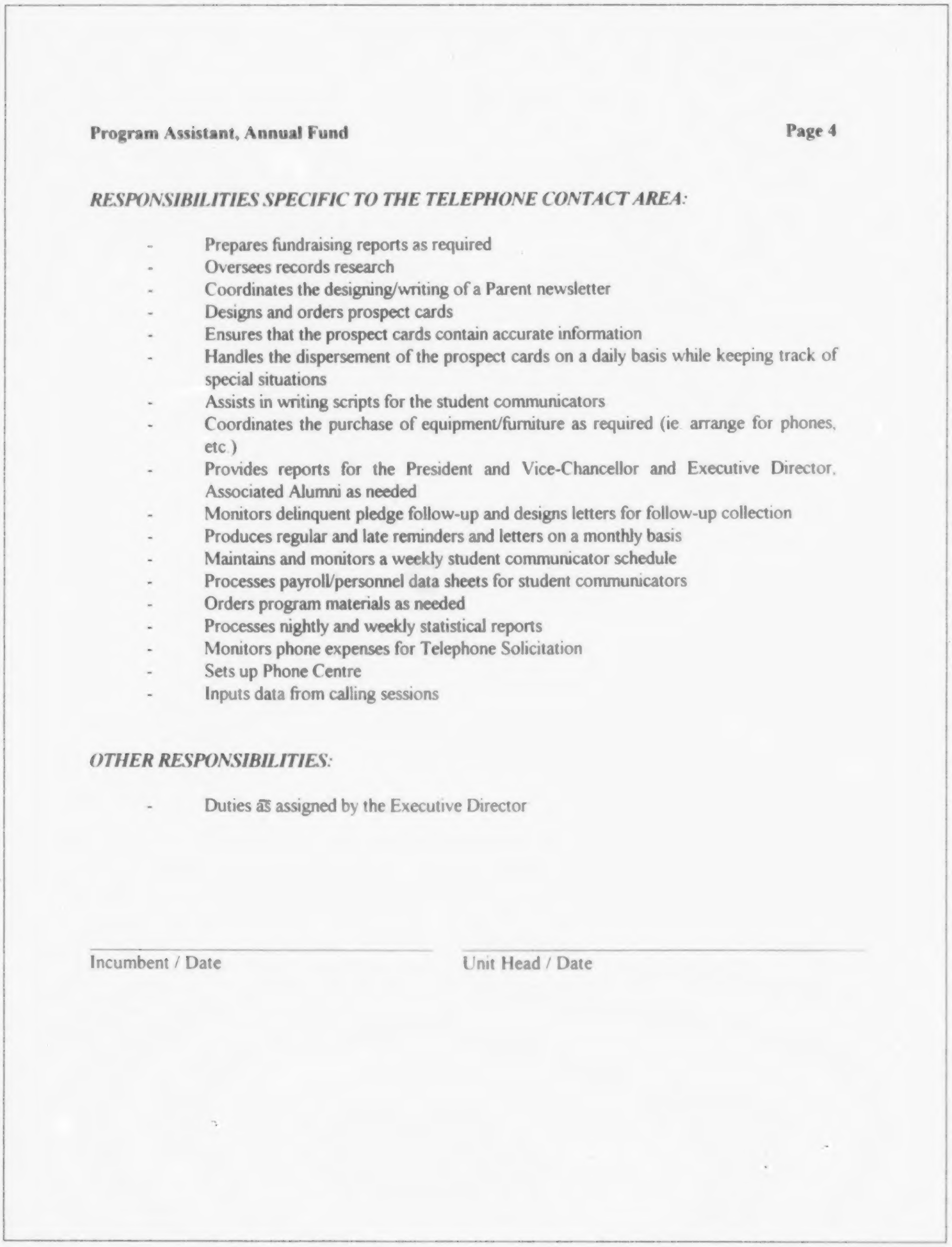
- Coordinates letter preparation associated with the Annual Fund (designer, Printshop, etc)
- Prepares a mailing schedule to ensure prospects are mailed to and called in a timely manner
- Develops and maintains the program's filing system
- Delegates work to part-time clerical staff
- Prepares a weekly clerical staff schedule
- Orders stationery and other program materials as needed (signing authority)
- Coordinates the designing of promotional material (brochure, flyers, etc) for the Annual Fund
- Processes payroll/personnel data sheets for all part-time clerical staff (signing authority)
- Handles any payroll concerns for the part-time clerical staff or directs the staff member to the appropriate person for assistance
- Maintains accurate personnel files
- Prepares the database for letter production
- Produces receipt acknowledgement letters on a regular basis
- Constructs letter files and runs the reports necessary to create the files
- Keep accurate records of mailing dates and prospect groups in each mailing, as well as the number of cards that are available for calling each week
- Orders brochures as needed
- Coordinates certain parts of special projects as they relate to fundraising (ie Alumni Directory)
- Assures that quality letter production occurs, by overseeing all facets of the letter production (signing, collating, checking, etc)
- Liaises with Class Officers re: special Class Fund mailings
- Prepares reports re special Class Fund mailings

Continues

SAMPLE JOB DESCRIPTION

Program Assistant, Annual Fund

ACADIA UNIVERSITY



Program Assistant, Annual Fund **Page 4**

RESPONSIBILITIES SPECIFIC TO THE TELEPHONE CONTACT AREA:

- Prepares fundraising reports as required
- Oversees records research
- Coordinates the designing/writing of a Parent newsletter
- Designs and orders prospect cards
- Ensures that the prospect cards contain accurate information
- Handles the dispersement of the prospect cards on a daily basis while keeping track of special situations
- Assists in writing scripts for the student communicators
- Coordinates the purchase of equipment/furniture as required (ie. arrange for phones, etc.)
- Provides reports for the President and Vice-Chancellor and Executive Director, Associated Alumni as needed
- Monitors delinquent pledge follow-up and designs letters for follow-up collection
- Produces regular and late reminders and letters on a monthly basis
- Maintains and monitors a weekly student communicator schedule
- Processes payroll/personnel data sheets for student communicators
- Orders program materials as needed
- Processes nightly and weekly statistical reports
- Monitors phone expenses for Telephone Solicitation
- Sets up Phone Centre
- Inputs data from calling sessions

OTHER RESPONSIBILITIES:

- Duties as assigned by the Executive Director

Incumbent / Date

Unit Head / Date

SAMPLE JOB DESCRIPTION

Executive Director, Alumni Association

BEREA COLLEGE

POSITION DESCRIPTION

Executive Director

Berea College Alumni Association

The Executive Director is responsible to the Vice President for Alumni Relations and Development and the Alumni Association Executive Council. The Executive Director shall have general supervision of the office and its activities and is charged with fulfilling the Association's purpose as stated.

The specific Alumni Association responsibilities are:

1. Organizing and directing the activities of the Alumni Association Executive Council, President's and Founder's Club, Second Century Club, and Navy V-12 Executive Committees.
2. Budget preparation and control.
3. Cultivation and solicitation of major alumni prospects.
4. Coordinating Founders' Club, President's Club and Second Century Club.
5. Coordinate President's Dinner
6. Managing editor of the Alumnus.
7. Publicity for the Alumni Association and Association sponsored events.
8. Coordinating the Class Planned Giving Program.
9. Assisting with the Alumni Chapter Program.
10. Directing the Class Reunion Giving Program.
11. Coordinating the Alumni Association Awards Program.
12. Coordinating the Alumni Association Tour Program.
13. Working as a liaison with the Admissions Office.
14. Performing related duties as designated by the Vice President for Alumni Relations and Development.

SAMPLE JOB DESCRIPTION

Associate Director (I), Alumni Association

BEREA COLLEGE

POSITION DESCRIPTION

Associate Director

Berea College Alumni Association

The Associate Director is responsible to the Executive Director in the fulfillment of responsibilities to Berea College and the Alumni Association Executive Council. The main responsibility shall be to foster the advancement of Berea College and the Alumni Association through fund-raising and social activities. The Associate Director must work both independently and cooperatively with others.

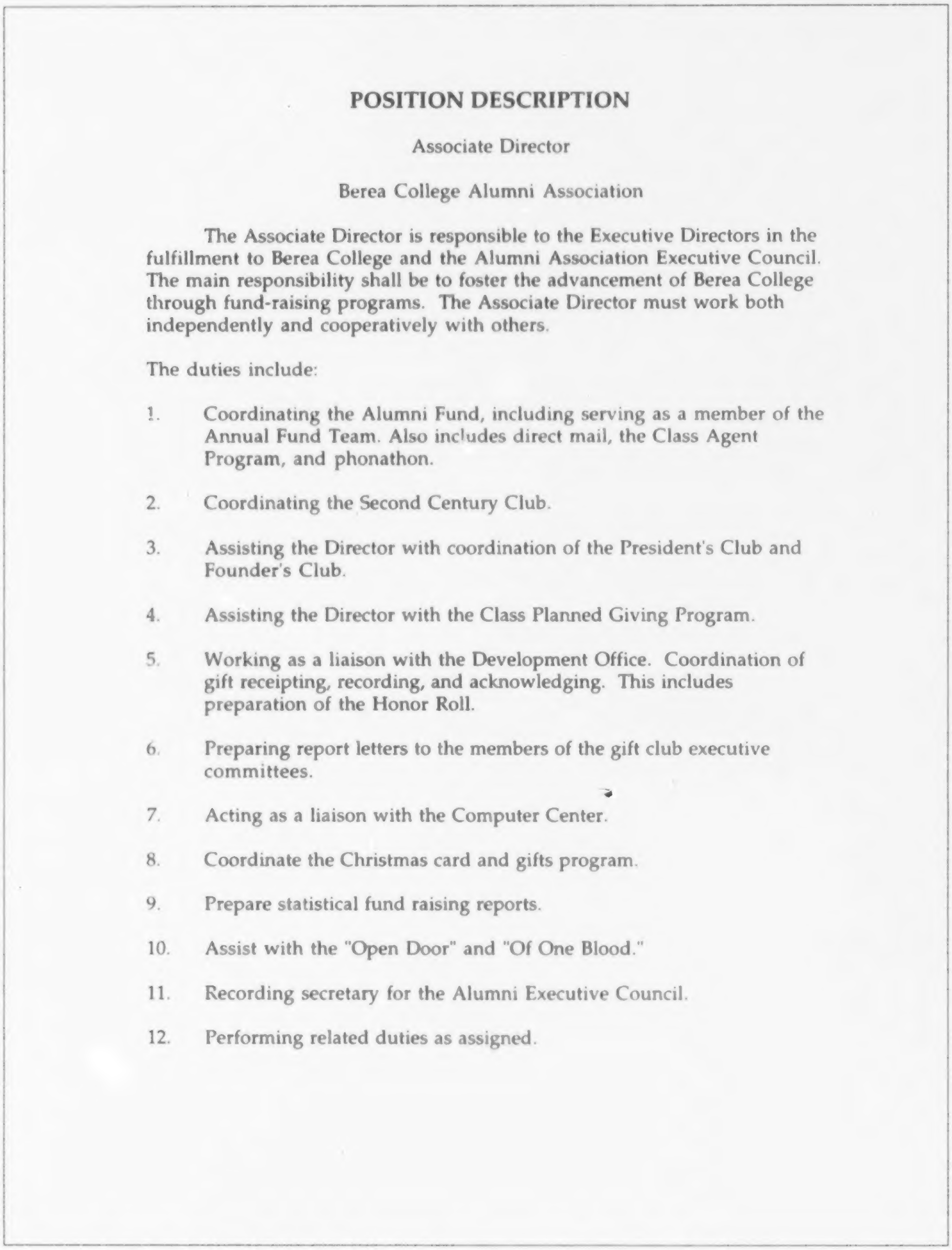
The duties include:

1. Organizing and directing Homecoming and Summer Reunion.
2. Personal solicitation.
3. Coordinating the Senior Giving Program.
4. Coordinating Alumni Chapters.
5. Acting as the advisor to the Student Alumni Relations Council (SARC)
6. Recording secretary for the Alumni Executive Council.
7. Associate Editor of the Alumnus, including the class notes section, promotions, and any related ideas.
8. Work/liaison with students/senior programs.
9. Foley Award.
10. Coordinate Scholar-Athlete Award program.
11. Serve as an Advisor for the Orientation Team.
12. Performing related duties as assigned.

SAMPLE JOB DESCRIPTION

Associate Director (II), Alumni Association

BEREA COLLEGE



POSITION DESCRIPTION

Associate Director

Berea College Alumni Association

The Associate Director is responsible to the Executive Directors in the fulfillment to Berea College and the Alumni Association Executive Council. The main responsibility shall be to foster the advancement of Berea College through fund-raising programs. The Associate Director must work both independently and cooperatively with others.

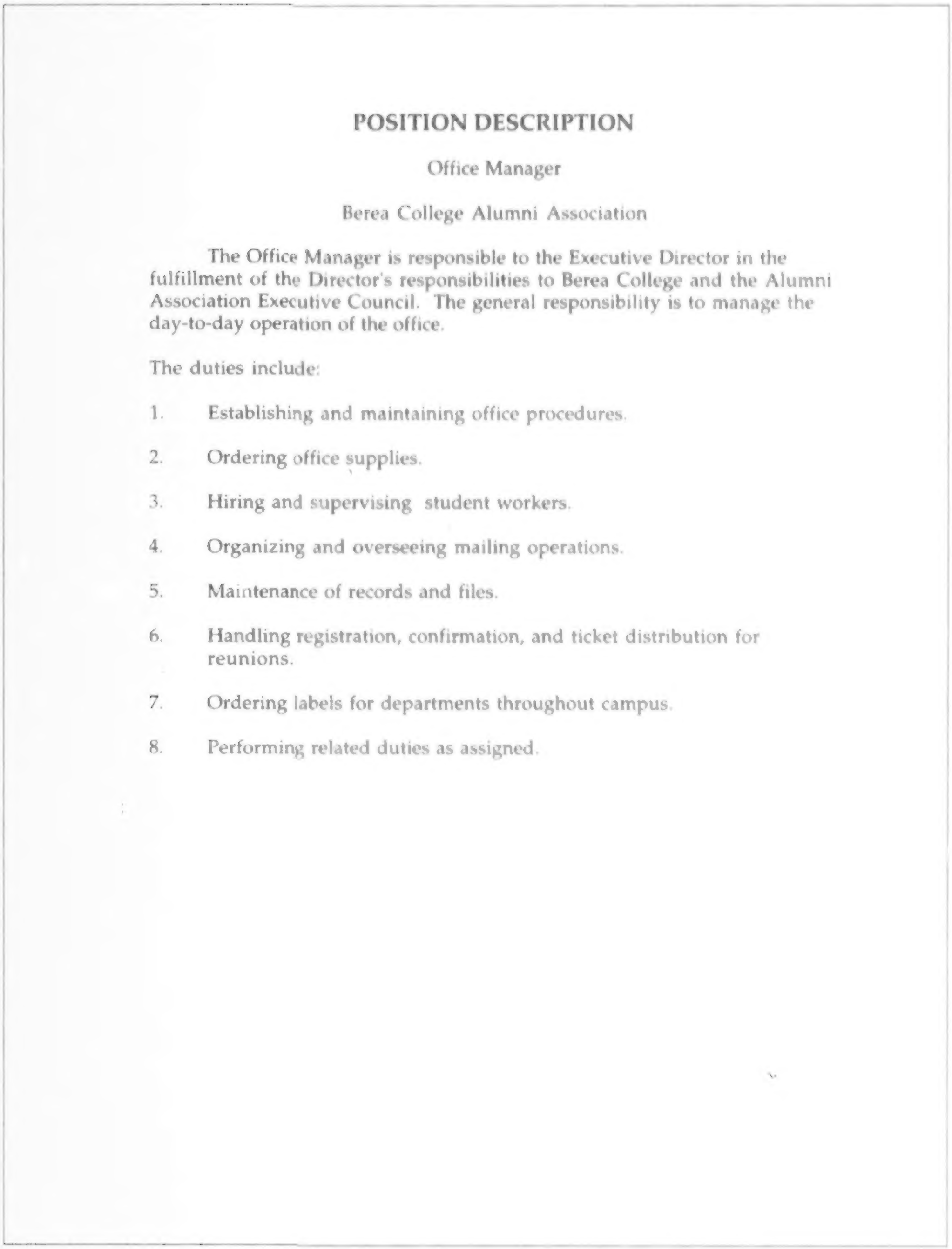
The duties include:

1. Coordinating the Alumni Fund, including serving as a member of the Annual Fund Team. Also includes direct mail, the Class Agent Program, and phonathon.
2. Coordinating the Second Century Club.
3. Assisting the Director with coordination of the President's Club and Founder's Club.
4. Assisting the Director with the Class Planned Giving Program.
5. Working as a liaison with the Development Office. Coordination of gift receipting, recording, and acknowledging. This includes preparation of the Honor Roll.
6. Preparing report letters to the members of the gift club executive committees.
7. Acting as a liaison with the Computer Center.
8. Coordinate the Christmas card and gifts program.
9. Prepare statistical fund raising reports.
10. Assist with the "Open Door" and "Of One Blood."
11. Recording secretary for the Alumni Executive Council.
12. Performing related duties as assigned.

SAMPLE JOB DESCRIPTION

Office Manager, Alumni Association

BEREA COLLEGE



POSITION DESCRIPTION

Office Manager

Berea College Alumni Association

The Office Manager is responsible to the Executive Director in the fulfillment of the Director's responsibilities to Berea College and the Alumni Association Executive Council. The general responsibility is to manage the day-to-day operation of the office.

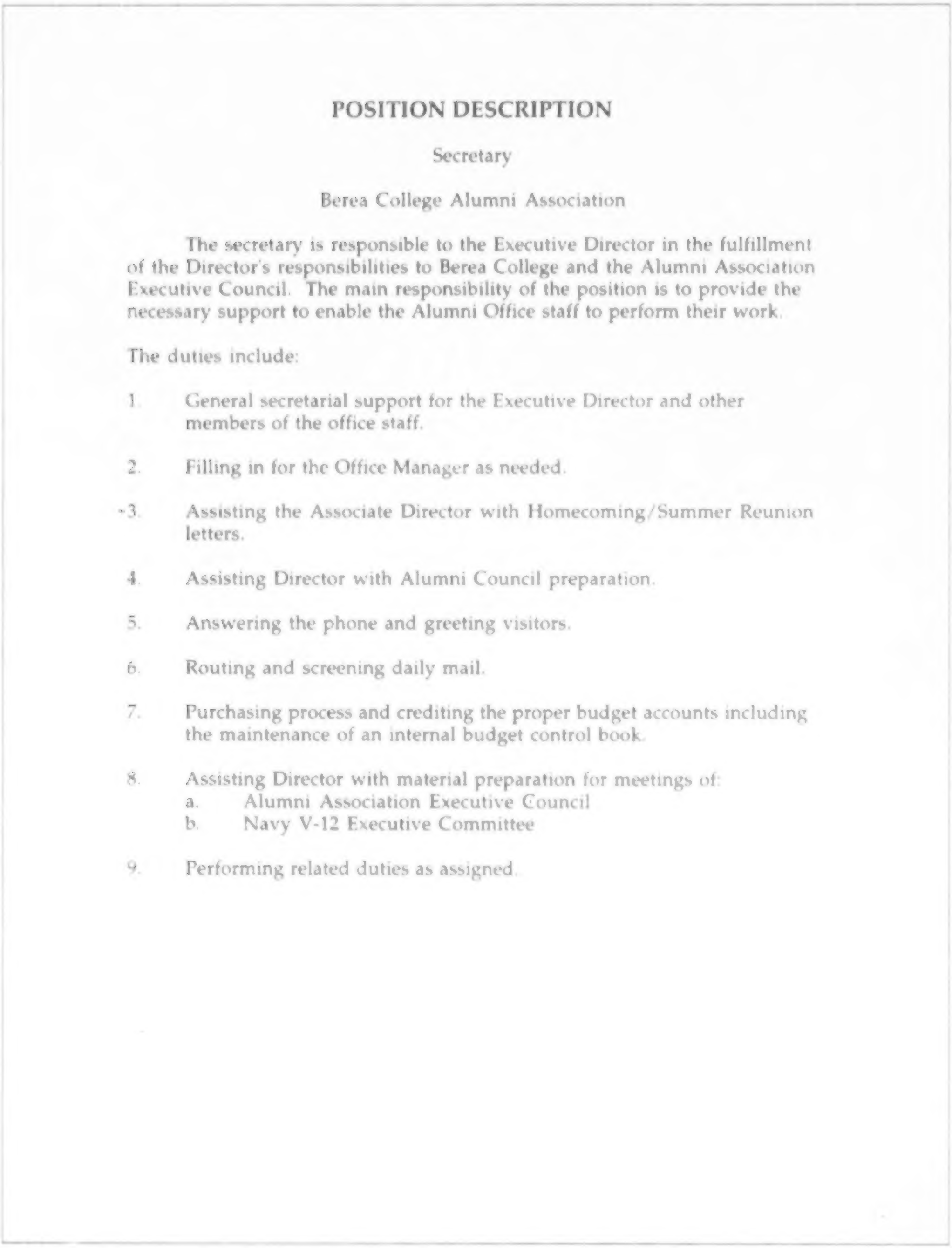
The duties include:

1. Establishing and maintaining office procedures.
2. Ordering office supplies.
3. Hiring and supervising student workers.
4. Organizing and overseeing mailing operations.
5. Maintenance of records and files.
6. Handling registration, confirmation, and ticket distribution for reunions.
7. Ordering labels for departments throughout campus.
8. Performing related duties as assigned.

SAMPLE JOB DESCRIPTION

Secretary, Alumni Association

BEREA COLLEGE



POSITION DESCRIPTION

Secretary

Berea College Alumni Association

The secretary is responsible to the Executive Director in the fulfillment of the Director's responsibilities to Berea College and the Alumni Association Executive Council. The main responsibility of the position is to provide the necessary support to enable the Alumni Office staff to perform their work.

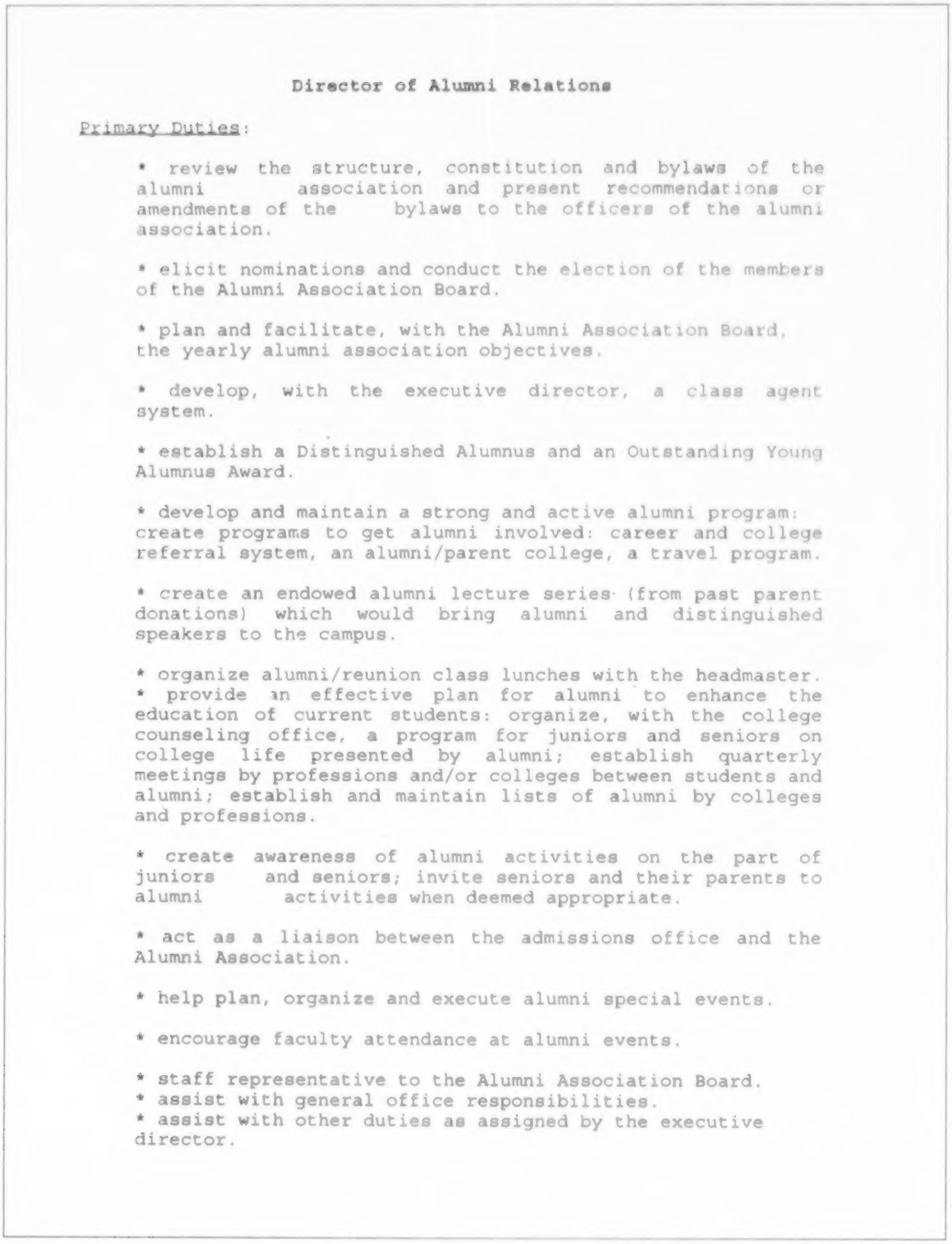
The duties include:

1. General secretarial support for the Executive Director and other members of the office staff.
2. Filling in for the Office Manager as needed.
3. Assisting the Associate Director with Homecoming/Summer Reunion letters.
4. Assisting Director with Alumni Council preparation.
5. Answering the phone and greeting visitors.
6. Routing and screening daily mail.
7. Purchasing process and crediting the proper budget accounts including the maintenance of an internal budget control book.
8. Assisting Director with material preparation for meetings of:
    - a. Alumni Association Executive Council
    - b. Navy V-12 Executive Committee
9. Performing related duties as assigned.

SAMPLE JOB DESCRIPTION

Director of Alumni Relations

BRUNSWICK SCHOOL



Director of Alumni Relations

Primary Duties:

* review the structure, constitution and bylaws of the alumni association and present recommendations or amendments of the bylaws to the officers of the alumni association.

* elicit nominations and conduct the election of the members of the Alumni Association Board.

* plan and facilitate, with the Alumni Association Board, the yearly alumni association objectives.

* develop, with the executive director, a class agent system.

* establish a Distinguished Alumnus and an Outstanding Young Alumnus Award.

* develop and maintain a strong and active alumni program: create programs to get alumni involved: career and college referral system, an alumni/parent college, a travel program.

* create an endowed alumni lecture series (from past parent donations) which would bring alumni and distinguished speakers to the campus.

* organize alumni/reunion class lunches with the headmaster.
* provide an effective plan for alumni to enhance the education of current students: organize, with the college counseling office, a program for juniors and seniors on college life presented by alumni; establish quarterly meetings by professions and/or colleges between students and alumni; establish and maintain lists of alumni by colleges and professions.

* create awareness of alumni activities on the part of juniors and seniors; invite seniors and their parents to alumni activities when deemed appropriate.

* act as a liaison between the admissions office and the Alumni Association.

* help plan, organize and execute alumni special events.

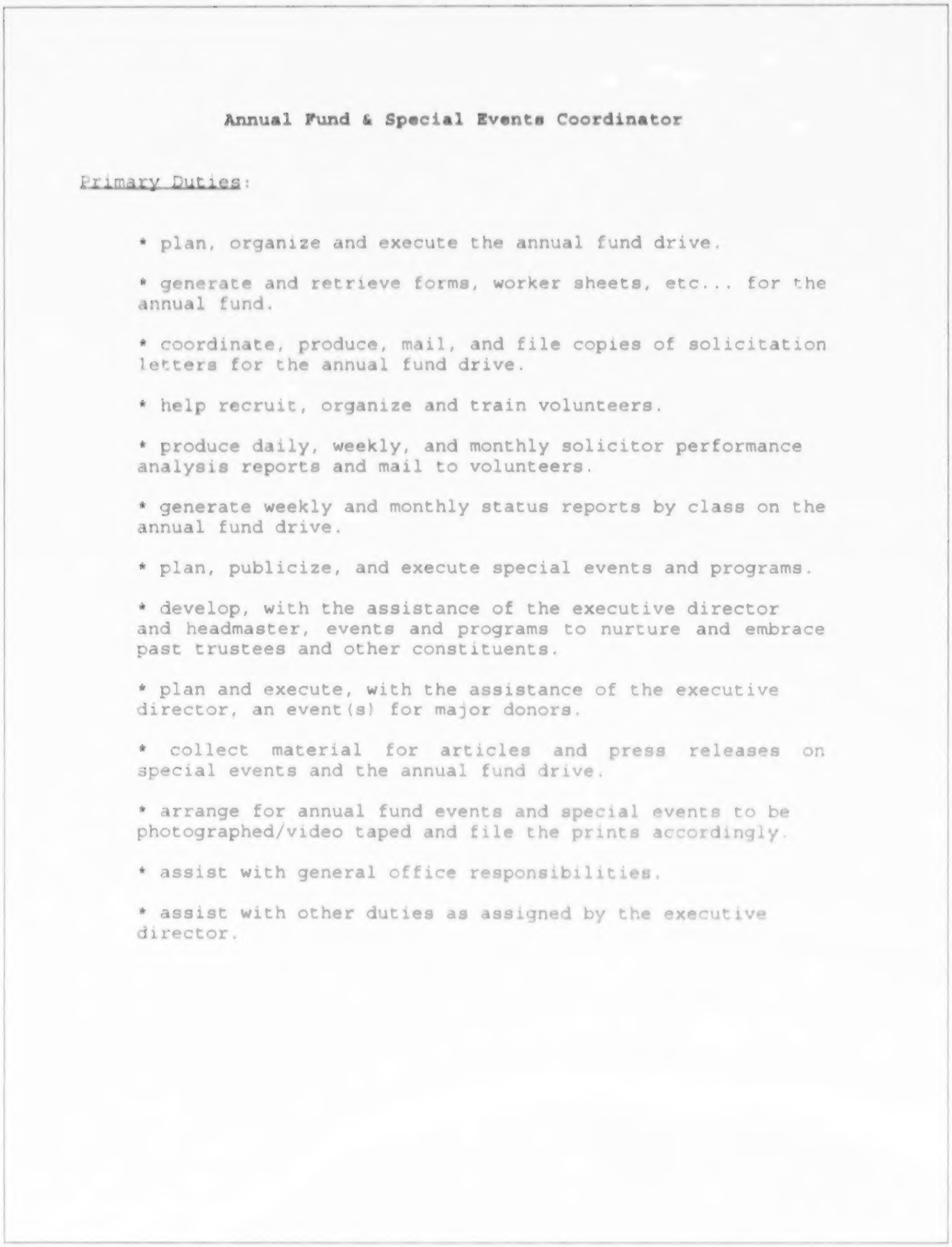
* encourage faculty attendance at alumni events.

* staff representative to the Alumni Association Board.
* assist with general office responsibilities.
* assist with other duties as assigned by the executive director.

SAMPLE JOB DESCRIPTION

Annual Fund and Special Events Coordinator

BRUNSWICK SCHOOL



Annual Fund & Special Events Coordinator

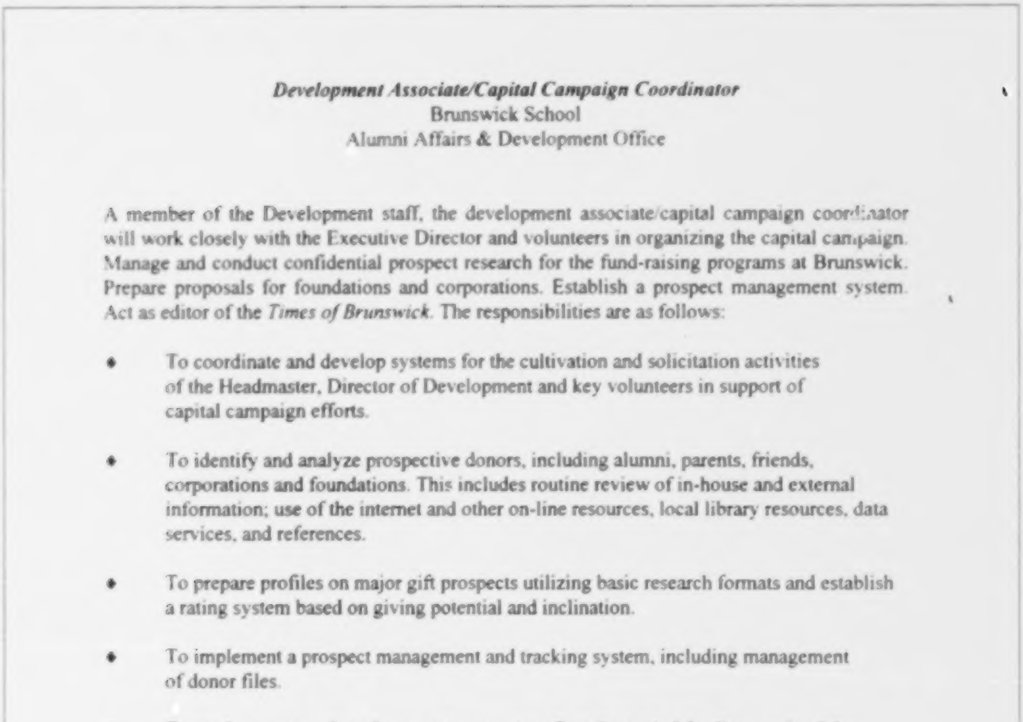
Primary Duties:

- plan, organize and execute the annual fund drive.
- generate and retrieve forms, worker sheets, etc... for the annual fund.
- coordinate, produce, mail, and file copies of solicitation letters for the annual fund drive.
- help recruit, organize and train volunteers.
- produce daily, weekly, and monthly solicitor performance analysis reports and mail to volunteers.
- generate weekly and monthly status reports by class on the annual fund drive.
- plan, publicize, and execute special events and programs.
- develop, with the assistance of the executive director and headmaster, events and programs to nurture and embrace past trustees and other constituents.
- plan and execute, with the assistance of the executive director, an event(s) for major donors.
- collect material for articles and press releases on special events and the annual fund drive.
- arrange for annual fund events and special events to be photographed/video taped and file the prints accordingly.
- assist with general office responsibilities.
- assist with other duties as assigned by the executive director.

SAMPLE JOB DESCRIPTION

Development Associate/Capital Campaign Coordinator

BRUNSWICK SCHOOL



Development Associate/Capital Campaign Coordinator
Brunswick School
Alumni Affairs & Development Office

A member of the Development staff, the development associate/capital campaign coordinator will work closely with the Executive Director and volunteers in organizing the capital campaign. Manage and conduct confidential prospect research for the fund-raising programs at Brunswick. Prepare proposals for foundations and corporations. Establish a prospect management system. Act as editor of the *Times of Brunswick*. The responsibilities are as follows:

- To coordinate and develop systems for the cultivation and solicitation activities of the Headmaster, Director of Development and key volunteers in support of capital campaign efforts.
- To identify and analyze prospective donors, including alumni, parents, friends, corporations and foundations. This includes routine review of in-house and external information; use of the internet and other on-line resources, local library resources, data services, and references.
- To prepare profiles on major gift prospects utilizing basic research formats and establish a rating system based on giving potential and inclination.
- To implement a prospect management and tracking system, including management of donor files.
- To produce proposals and case statements to reflect the capital funding needs of the School. Coordinate foundation and corporation solicitation.
- To serve as editor of the *Times of Brunswick*.
- To coordinate all written and photographic material for publication in the TOB and other publications as needed.
- To assist with general office responsibilities (phone, FAX, photo copy).
- To perform other duties as assigned by the Director of Development.

Qualifications:

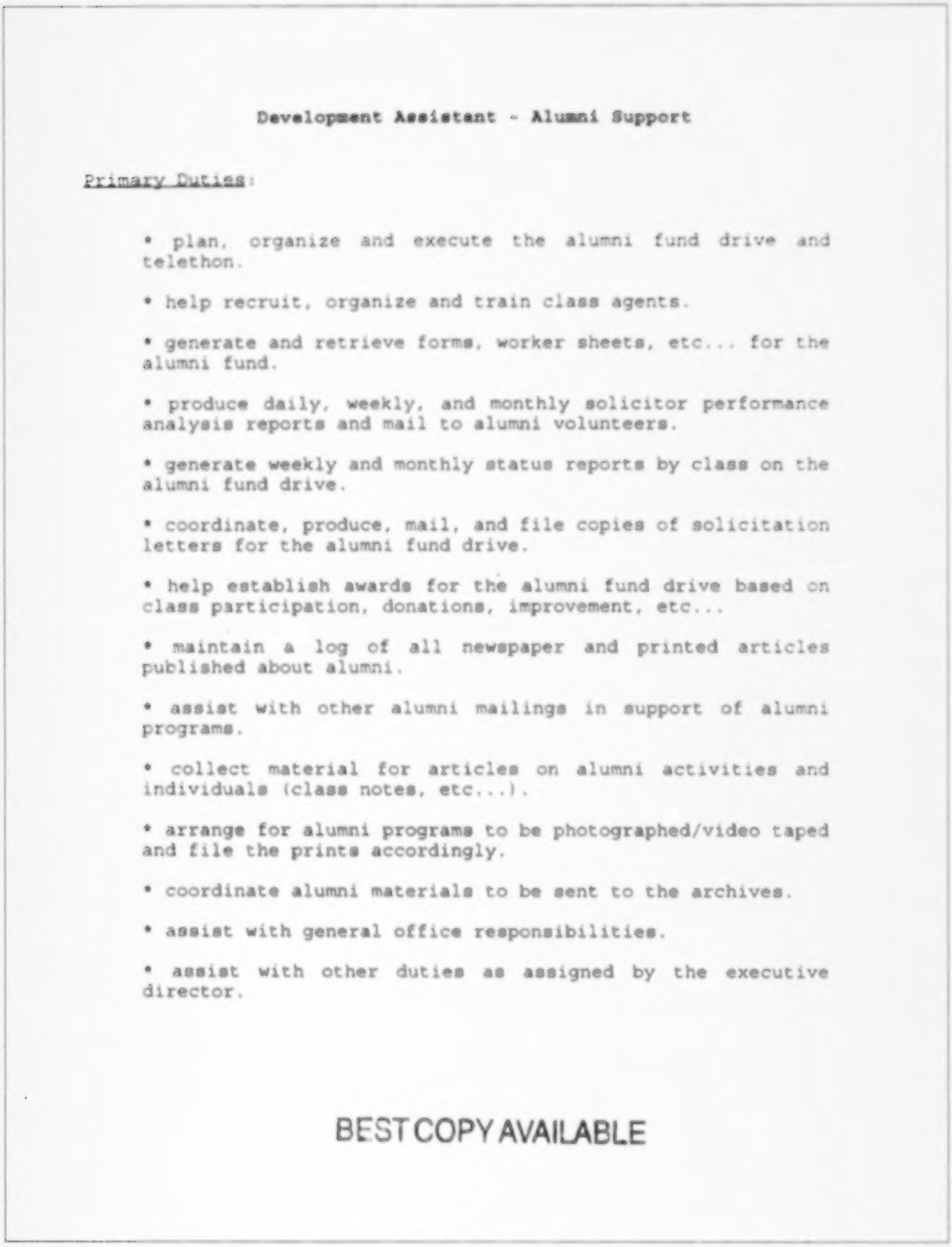
Willingness to take initiative and work as a team member in an ambitious fund-raising campaign. The ability to work with confidential information with an attention to detail. The ability to work under pressure and meet deadlines. Working knowledge of Windows, Microsoft Word and Excel. Strong organizational and written and oral communication skills. Sense of humor.

research.doc

SAMPLE JOB DESCRIPTION

Development Assistant-Alumni Support

BRUNSWICK SCHOOL



Development Assistant - Alumni Support

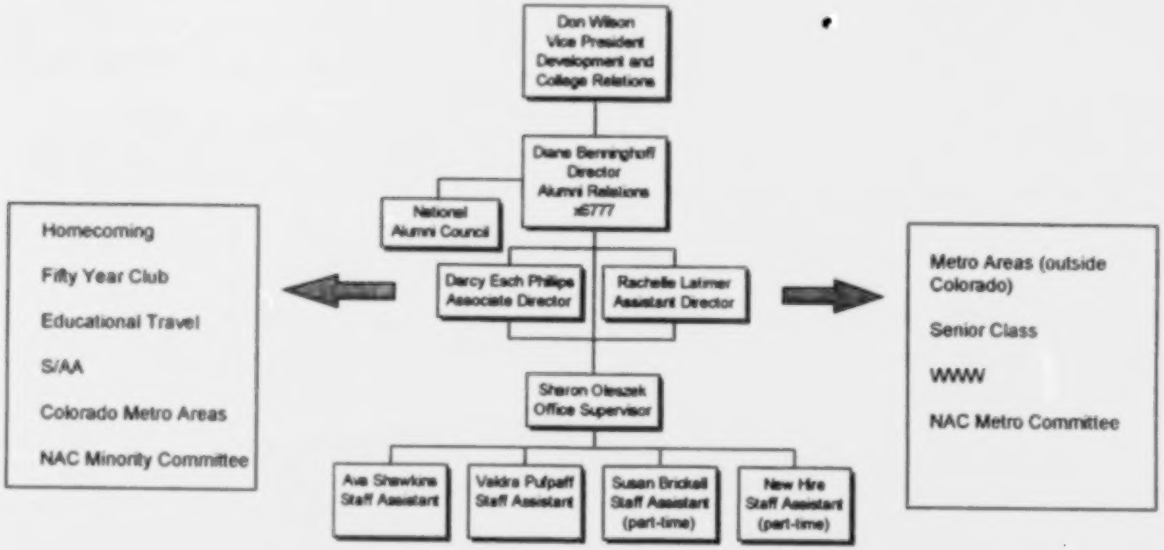
Primary Duties:

- plan, organize and execute the alumni fund drive and telethon.
- help recruit, organize and train class agents.
- generate and retrieve forms, worker sheets, etc... for the alumni fund.
- produce daily, weekly, and monthly solicitor performance analysis reports and mail to alumni volunteers.
- generate weekly and monthly status reports by class on the alumni fund drive.
- coordinate, produce, mail, and file copies of solicitation letters for the alumni fund drive.
- help establish awards for the alumni fund drive based on class participation, donations, improvement, etc...
- maintain a log of all newspaper and printed articles published about alumni.
- assist with other alumni mailings in support of alumni programs.
- collect material for articles on alumni activities and individuals (class notes, etc...).
- arrange for alumni programs to be photographed/video taped and file the prints accordingly.
- coordinate alumni materials to be sent to the archives.
- assist with general office responsibilities.
- assist with other duties as assigned by the executive director.

BEST COPY AVAILABLE

SAMPLE ORGANIZATIONAL CHART
COLORADO COLLEGE ALUMNI OFFICE

COLORADO COLLEGE ALUMNI OFFICE

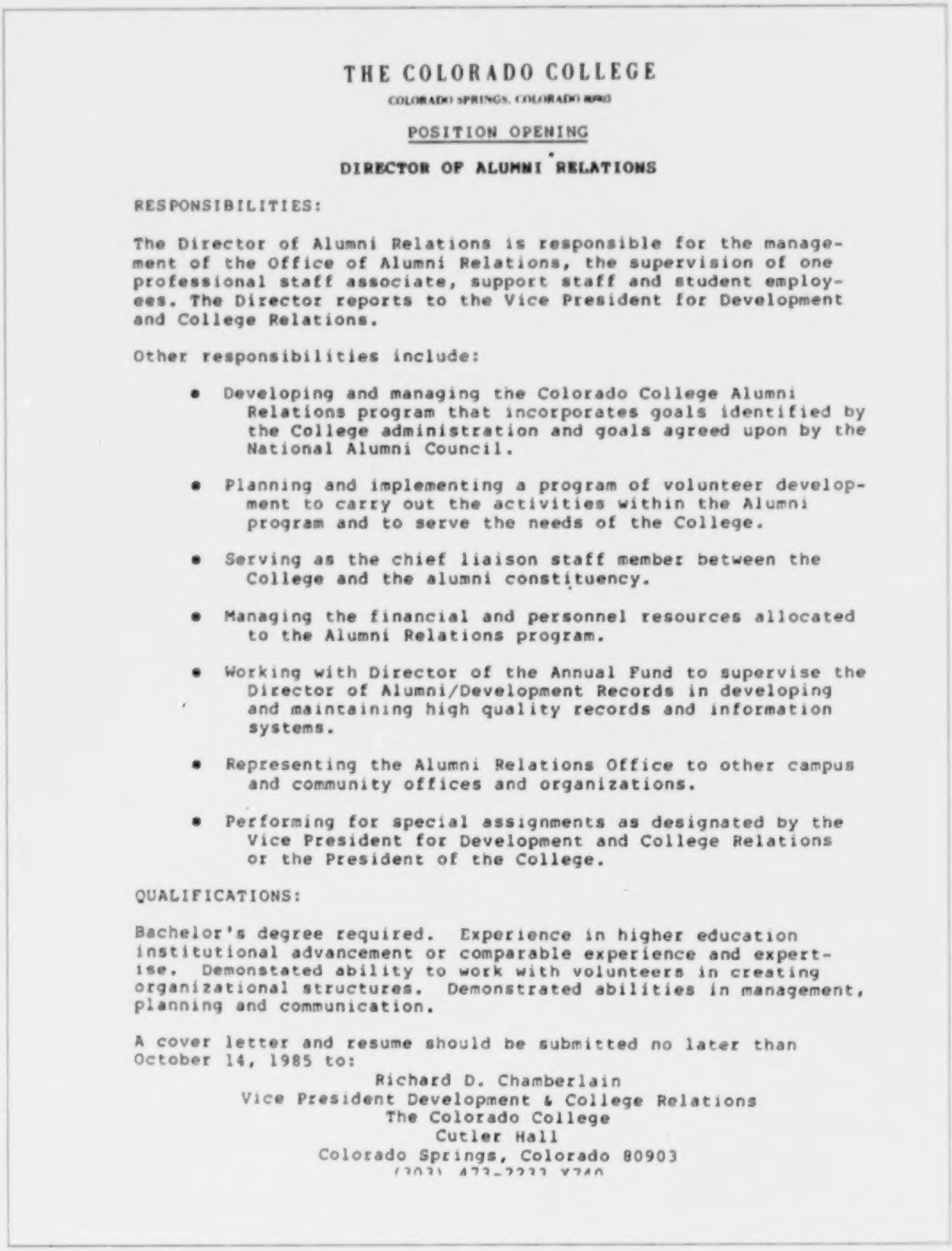

Don Wilson
Vice President
Development and
College Relations
Diane Berninghoff
Director
Alumni Relations
x6777
National
Alumni Council
Darcy Esch Phillips
Associate Director
Rachelle Latimer
Assistant Director
Sharon Oleszek
Office Supervisor
Ava Shawkins
Staff Assistant
Valdra Pulpaff
Staff Assistant
Susan Brickell
Staff Assistant
(part-time)
New Hire
Staff Assistant
(part-time)
Homecoming
Fifty Year Club
Educational Travel
S/AA
Colorado Metro Areas
NAC Minority Committee
Metro Areas (outside
Colorado)
Senior Class
WWW
NAC Metro Committee

BEST COPY AVAILABLE

SAMPLE JOB DESCRIPTION

Director of Alumni Relations

COLORADO COLLEGE



THE COLORADO COLLEGE

COLORADO SPRINGS, COLORADO 80903

POSITION OPENING

DIRECTOR OF ALUMNI RELATIONS

RESPONSIBILITIES:

The Director of Alumni Relations is responsible for the management of the Office of Alumni Relations, the supervision of one professional staff associate, support staff and student employees. The Director reports to the Vice President for Development and College Relations.

Other responsibilities include:

- Developing and managing the Colorado College Alumni Relations program that incorporates goals identified by the College administration and goals agreed upon by the National Alumni Council.
- Planning and implementing a program of volunteer development to carry out the activities within the Alumni program and to serve the needs of the College.
- Serving as the chief liaison staff member between the College and the alumni constituency.
- Managing the financial and personnel resources allocated to the Alumni Relations program.
- Working with Director of the Annual Fund to supervise the Director of Alumni/Development Records in developing and maintaining high quality records and information systems.
- Representing the Alumni Relations Office to other campus and community offices and organizations.
- Performing for special assignments as designated by the Vice President for Development and College Relations or the President of the College.

QUALIFICATIONS:

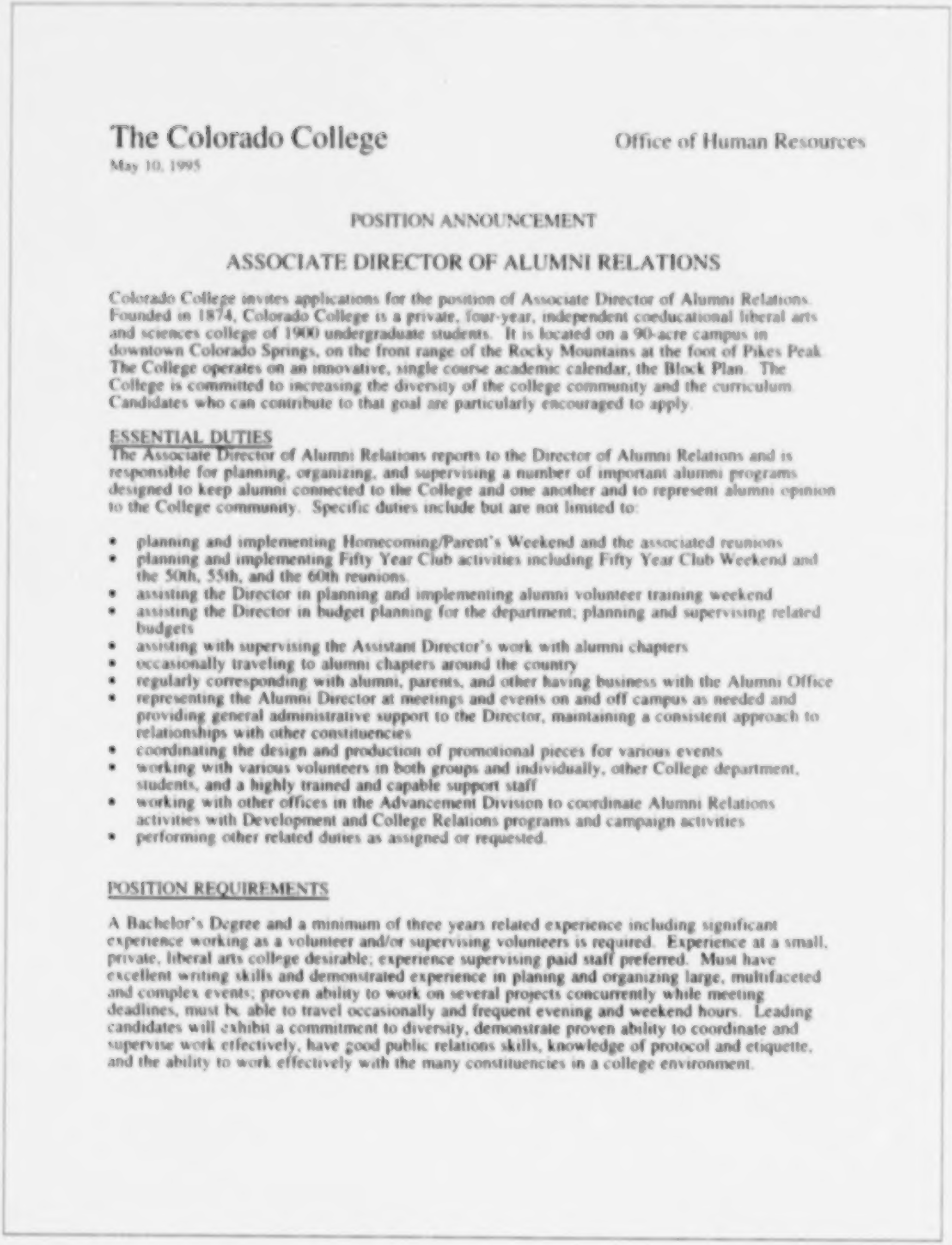
Bachelor's degree required. Experience in higher education institutional advancement or comparable experience and expertise. Demonstated ability to work with volunteers in creating organizational structures. Demonstrated abilities in management, planning and communication.

A cover letter and resume should be submitted no later than October 14, 1985 to:

Richard D. Chamberlain
Vice President Development & College Relations
The Colorado College
Cutler Hall
Colorado Springs, Colorado 80903
(303) 473-2233 X740

BEST COPY AVAILABLE

SAMPLE JOB DESCRIPTION
Associate Director of Alumni Relations
COLORADO COLLEGE



The Colorado College Office of Human Resources

May 10, 1995

POSITION ANNOUNCEMENT

ASSOCIATE DIRECTOR OF ALUMNI RELATIONS

Colorado College invites applications for the position of Associate Director of Alumni Relations. Founded in 1874, Colorado College is a private, four-year, independent coeducational liberal arts and sciences college of 1900 undergraduate students. It is located on a 90-acre campus in downtown Colorado Springs, on the front range of the Rocky Mountains at the foot of Pikes Peak. The College operates on an innovative, single course academic calendar, the Block Plan. The College is committed to increasing the diversity of the college community and the curriculum. Candidates who can contribute to that goal are particularly encouraged to apply.

ESSENTIAL DUTIES

The Associate Director of Alumni Relations reports to the Director of Alumni Relations and is responsible for planning, organizing, and supervising a number of important alumni programs designed to keep alumni connected to the College and one another and to represent alumni opinion to the College community. Specific duties include but are not limited to:

- planning and implementing Homecoming/Parent's Weekend and the associated reunions
- planning and implementing Fifty Year Club activities including Fifty Year Club Weekend and the 50th, 55th, and the 60th reunions
- assisting the Director in planning and implementing alumni volunteer training weekend
- assisting the Director in budget planning for the department; planning and supervising related budgets
- assisting with supervising the Assistant Director's work with alumni chapters
- occasionally traveling to alumni chapters around the country
- regularly corresponding with alumni, parents, and other having business with the Alumni Office
- representing the Alumni Director at meetings and events on and off campus as needed and providing general administrative support to the Director, maintaining a consistent approach to relationships with other constituencies
- coordinating the design and production of promotional pieces for various events
- working with various volunteers in both groups and individually, other College department, students, and a highly trained and capable support staff
- working with other offices in the Advancement Division to coordinate Alumni Relations activities with Development and College Relations programs and campaign activities
- performing other related duties as assigned or requested.

POSITION REQUIREMENTS

A Bachelor's Degree and a minimum of three years related experience including significant experience working as a volunteer and/or supervising volunteers is required. Experience at a small, private, liberal arts college desirable; experience supervising paid staff preferred. Must have excellent writing skills and demonstrated experience in planing and organizing large, multifaceted and complex events; proven ability to work on several projects concurrently while meeting deadlines, must be able to travel occasionally and frequent evening and weekend hours. Leading candidates will exhibit a commitment to diversity, demonstrate proven ability to coordinate and supervise work effectively, have good public relations skills, knowledge of protocol and etiquette, and the ability to work effectively with the many constituencies in a college environment.

SAMPLE JOB DESCRIPTION

Office Supervisor

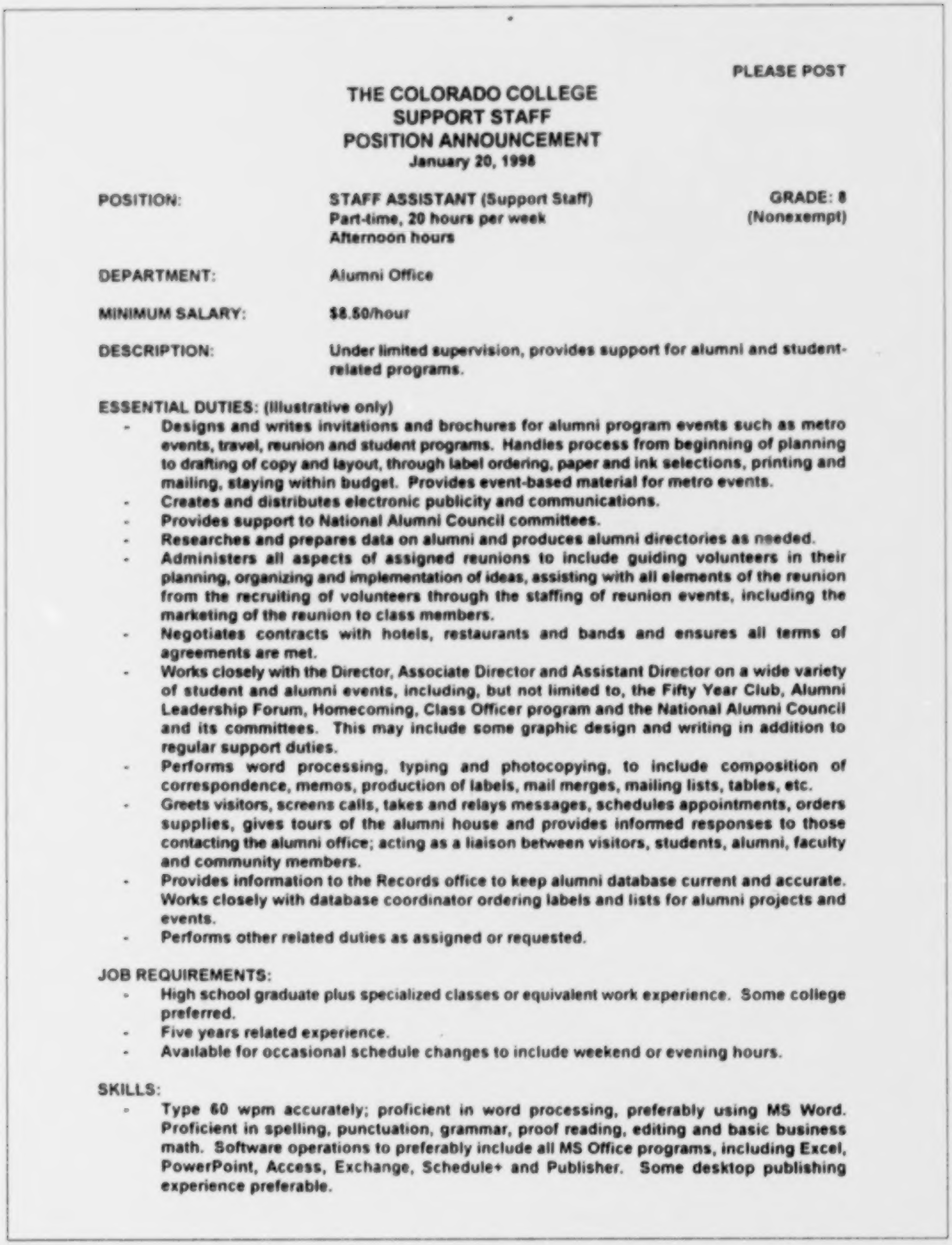
COLORADO COLLEGE

THE COLORADO COLLEGE
POSITION DESCRIPTION

TITLE:	**OFFICE SUPERVISOR**
SUMMARY:	Under minimal supervision, supervises the various activities associated with alumni-student related programs.
DEPARTMENT:	Alumni Office
REPORTS TO:	Director of Alumni Relations
REQUIREMENTS:	
EDUCATION:	Some college/Associate's Degree or equivalent work experience.
EXPERIENCE:	Four to six years related experience to include supervisory experience.
SKILLS:	Type 60 wpm accurately; proficient in word processing, preferably using WordPerfect 5.1. Software operations to include spreadsheets, Quattro Pro preferred.
OTHER:	Finger and wrist dexterity, and hand/eye coordination, to perform keyboard functions. Considerable sitting, occasional stooping, bending and standing, light physical effort (lifting up to 10 pounds).
MACHINES, TOOLS & EQUIPMENT USED:	Standard office equipment such as personal computer, laser printer, typewriter, copy machine, telephone, calculator, fax machine, etc.
SUPERVISORY RESPONSIBILITY:	Supervisory responsibility for support staff, student workers and volunteers.
ESSENTIAL DUTIES:	Delegates and supervises work requested by the Director and Associate Director of Alumni Relations. Supervises support staff, student workers and volunteers. Completes performance evaluations. Coordinates and schedules administrative, faculty and alumni travel. Works closely with the Associate Director to plan and implement all activities associated with Homecoming Weekend. Organizes and leads a committee to plan, schedule and implement class/special reunions. Works with student class officers to coordinate class elections, oversees the class budge, and assists in planning and organizing student events and activities. Maintains records for yearly budget. Acts as purchasing agent for the Alumni Relations office.

BEST COPY AVAILABLE

SAMPLE JOB DESCRIPTION
Staff Assistant
COLORADO COLLEGE



PLEASE POST

THE COLORADO COLLEGE
SUPPORT STAFF
POSITION ANNOUNCEMENT
January 20, 1998

POSITION:	STAFF ASSISTANT (Support Staff) Part-time, 20 hours per week Afternoon hours	GRADE: 8 (Nonexempt)
DEPARTMENT:	Alumni Office	
MINIMUM SALARY:	$8.50/hour	
DESCRIPTION:	Under limited supervision, provides support for alumni and student-related programs.	

ESSENTIAL DUTIES: (Illustrative only)

- Designs and writes invitations and brochures for alumni program events such as metro events, travel, reunion and student programs. Handles process from beginning of planning to drafting of copy and layout, through label ordering, paper and ink selections, printing and mailing, staying within budget. Provides event-based material for metro events.
- Creates and distributes electronic publicity and communications.
- Provides support to National Alumni Council committees.
- Researches and prepares data on alumni and produces alumni directories as needed.
- Administers all aspects of assigned reunions to include guiding volunteers in their planning, organizing and implementation of ideas, assisting with all elements of the reunion from the recruiting of volunteers through the staffing of reunion events, including the marketing of the reunion to class members.
- Negotiates contracts with hotels, restaurants and bands and ensures all terms of agreements are met.
- Works closely with the Director, Associate Director and Assistant Director on a wide variety of student and alumni events, including, but not limited to, the Fifty Year Club, Alumni Leadership Forum, Homecoming, Class Officer program and the National Alumni Council and its committees. This may include some graphic design and writing in addition to regular support duties.
- Performs word processing, typing and photocopying, to include composition of correspondence, memos, production of labels, mail merges, mailing lists, tables, etc.
- Greets visitors, screens calls, takes and relays messages, schedules appointments, orders supplies, gives tours of the alumni house and provides informed responses to those contacting the alumni office; acting as a liaison between visitors, students, alumni, faculty and community members.
- Provides information to the Records office to keep alumni database current and accurate. Works closely with database coordinator ordering labels and lists for alumni projects and events.
- Performs other related duties as assigned or requested.

JOB REQUIREMENTS:

- High school graduate plus specialized classes or equivalent work experience. Some college preferred.
- Five years related experience.
- Available for occasional schedule changes to include weekend or evening hours.

SKILLS:

- Type 60 wpm accurately; proficient in word processing, preferably using MS Word. Proficient in spelling, punctuation, grammar, proof reading, editing and basic business math. Software operations to preferably include all MS Office programs, including Excel, PowerPoint, Access, Exchange, Schedule+ and Publisher. Some desktop publishing experience preferable.

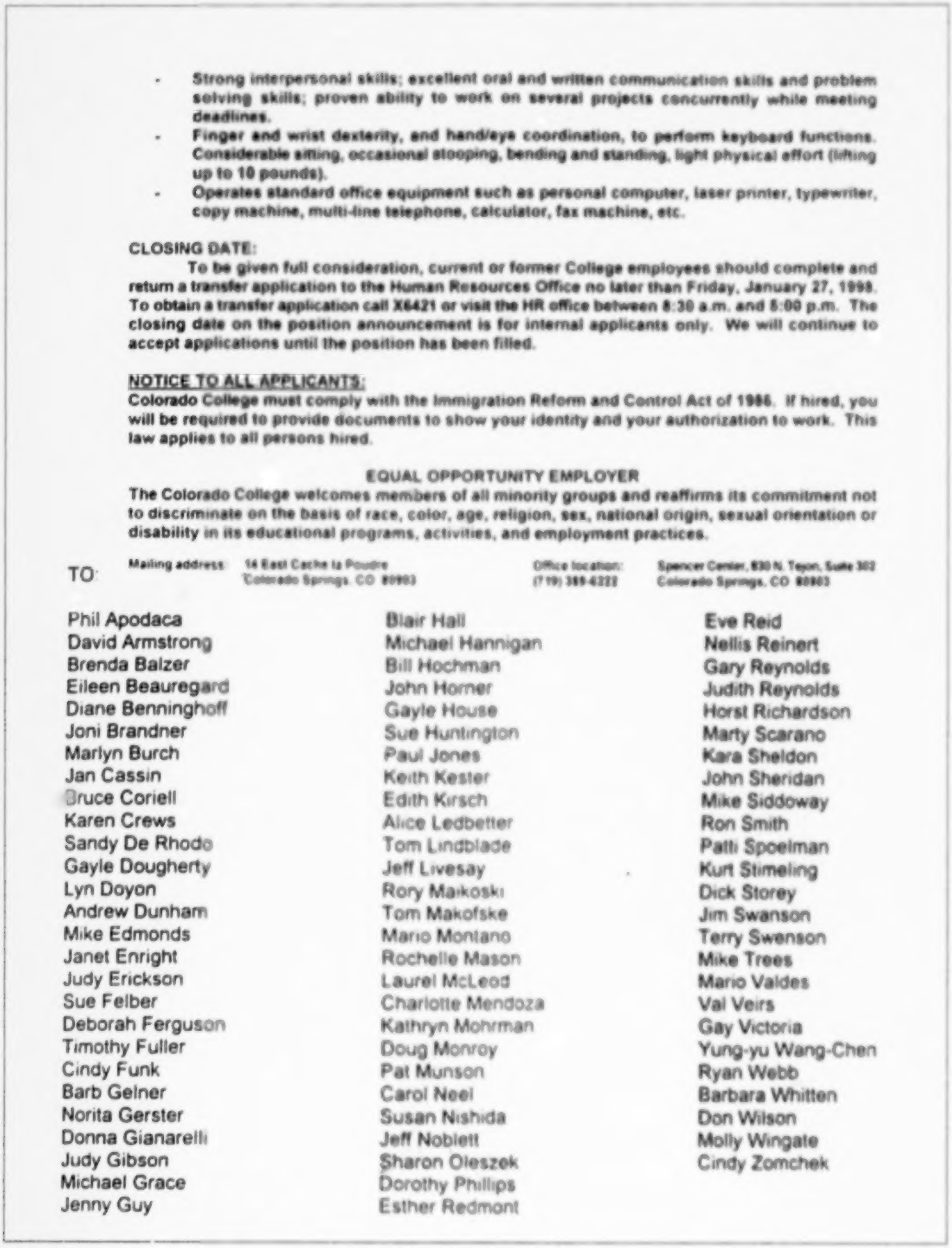
Continues

BEST COPY AVAILABLE

SAMPLE JOB DESCRIPTION

Staff Assistant

COLORADO COLLEGE



- Strong interpersonal skills; excellent oral and written communication skills and problem solving skills; proven ability to work on several projects concurrently while meeting deadlines.
- Finger and wrist dexterity, and hand/eye coordination, to perform keyboard functions. Considerable sitting, occasional stooping, bending and standing, light physical effort (lifting up to 10 pounds).
- Operates standard office equipment such as personal computer, laser printer, typewriter, copy machine, multi-line telephone, calculator, fax machine, etc.

CLOSING DATE:

To be given full consideration, current or former College employees should complete and return a transfer application to the Human Resources Office no later than Friday, January 27, 1998. To obtain a transfer application call X6421 or visit the HR office between 8:30 a.m. and 5:00 p.m. The closing date on the position announcement is for internal applicants only. We will continue to accept applications until the position has been filled.

NOTICE TO ALL APPLICANTS:

Colorado College must comply with the Immigration Reform and Control Act of 1986. If hired, you will be required to provide documents to show your identity and your authorization to work. This law applies to all persons hired.

EQUAL OPPORTUNITY EMPLOYER

The Colorado College welcomes members of all minority groups and reaffirms its commitment not to discriminate on the basis of race, color, age, religion, sex, national origin, sexual orientation or disability in its educational programs, activities, and employment practices.

Mailing address: 14 East Cache la Poudre
Colorado Springs, CO 80903

Office location: Spencer Center, 830 N. Tejon, Suite 302
(719) 389-6222
Colorado Springs, CO 80903

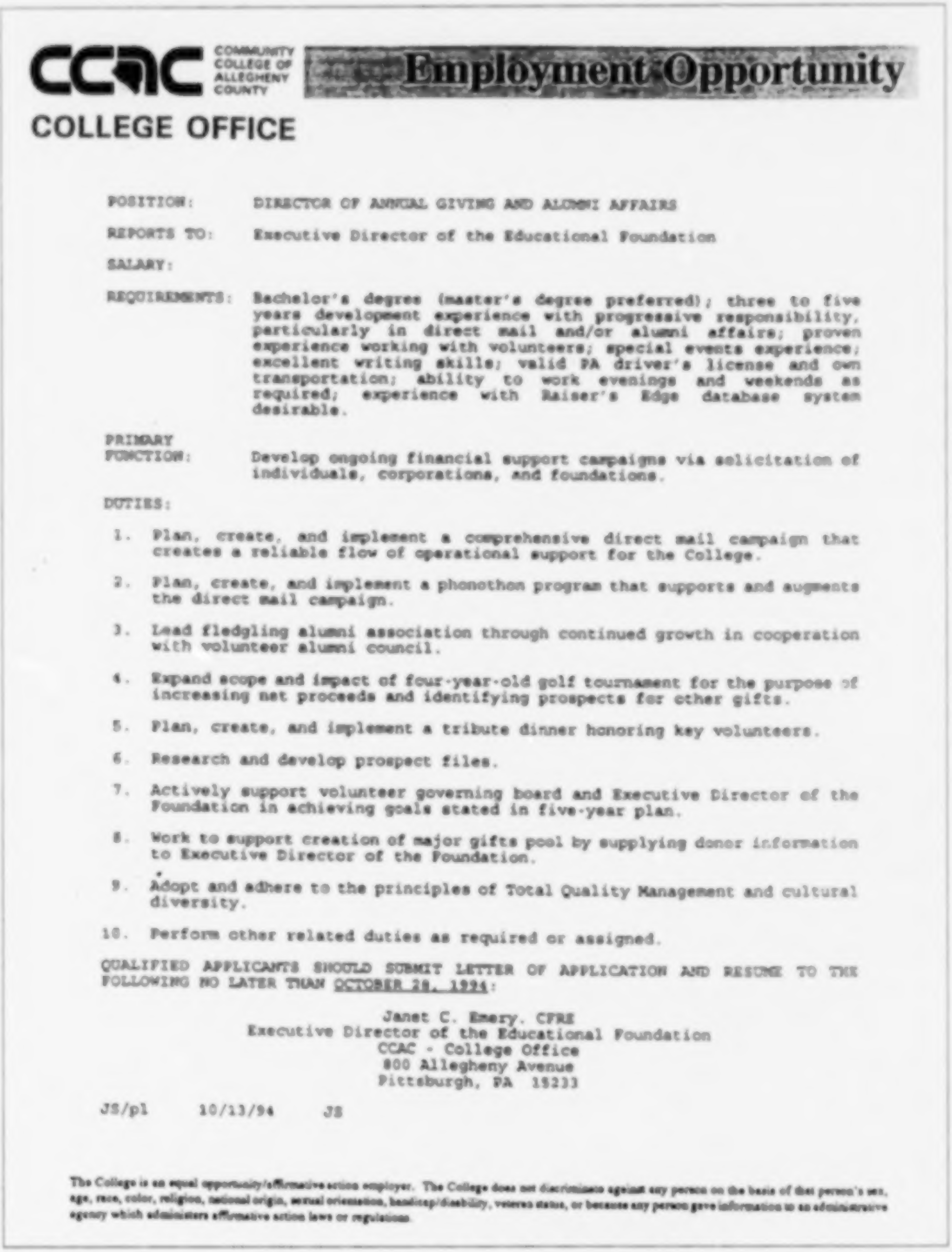
TO:

Phil Apodaca
David Armstrong
Brenda Balzer
Eileen Beauregard
Diane Benninghoff
Joni Brandner
Marlyn Burch
Jan Cassin
Bruce Coriell
Karen Crews
Sandy De Rhodo
Gayle Dougherty
Lyn Doyon
Andrew Dunham
Mike Edmonds
Janet Enright
Judy Erickson
Sue Felber
Deborah Ferguson
Timothy Fuller
Cindy Funk
Barb Gelner
Norita Gerster
Donna Gianarelli
Judy Gibson
Michael Grace
Jenny Guy
Blair Hall
Michael Hannigan
Bill Hochman
John Horner
Gayle House
Sue Huntington
Paul Jones
Keith Kester
Edith Kirsch
Alice Ledbetter
Tom Lindblade
Jeff Livesay
Rory Maikoski
Tom Makofske
Mario Montano
Rochelle Mason
Laurel McLeod
Charlotte Mendoza
Kathryn Mohrman
Doug Monroy
Pat Munson
Carol Neel
Susan Nishida
Jeff Noblett
Sharon Oleszek
Dorothy Phillips
Esther Redmont
Eve Reid
Nellis Reinert
Gary Reynolds
Judith Reynolds
Horst Richardson
Marty Scarano
Kara Sheldon
John Sheridan
Mike Siddoway
Ron Smith
Patti Spoelman
Kurt Stimeling
Dick Storey
Jim Swanson
Terry Swenson
Mike Trees
Mario Valdes
Val Veirs
Gay Victoria
Yung-yu Wang-Chen
Ryan Webb
Barbara Whitten
Don Wilson
Molly Wingate
Cindy Zomchek

SAMPLE JOB DESCRIPTION

Director of Annual Giving and Alumni Affairs

COMMUNITY COLLEGE OF ALLEGHENY COUNTY



CCAC COMMUNITY COLLEGE OF ALLEGHENY COUNTY

Employment Opportunity

COLLEGE OFFICE

POSITION: DIRECTOR OF ANNUAL GIVING AND ALUMNI AFFAIRS

REPORTS TO: Executive Director of the Educational Foundation

SALARY:

REQUIREMENTS: Bachelor's degree (master's degree preferred); three to five years development experience with progressive responsibility, particularly in direct mail and/or alumni affairs; proven experience working with volunteers; special events experience; excellent writing skills; valid PA driver's license and own transportation; ability to work evenings and weekends as required; experience with Raiser's Edge database system desirable.

PRIMARY FUNCTION: Develop ongoing financial support campaigns via solicitation of individuals, corporations, and foundations.

DUTIES:

1. Plan, create, and implement a comprehensive direct mail campaign that creates a reliable flow of operational support for the College.
2. Plan, create, and implement a phonothon program that supports and augments the direct mail campaign.
3. Lead fledgling alumni association through continued growth in cooperation with volunteer alumni council.
4. Expand scope and impact of four-year-old golf tournament for the purpose of increasing net proceeds and identifying prospects for other gifts.
5. Plan, create, and implement a tribute dinner honoring key volunteers.
6. Research and develop prospect files.
7. Actively support volunteer governing board and Executive Director of the Foundation in achieving goals stated in five-year plan.
8. Work to support creation of major gifts pool by supplying donor information to Executive Director of the Foundation.
9. Adopt and adhere to the principles of Total Quality Management and cultural diversity.
10. Perform other related duties as required or assigned.

QUALIFIED APPLICANTS SHOULD SUBMIT LETTER OF APPLICATION AND RESUME TO THE FOLLOWING NO LATER THAN OCTOBER 28, 1994:

Janet C. Emery, CFRE
Executive Director of the Educational Foundation
CCAC - College Office
800 Allegheny Avenue
Pittsburgh, PA 15233

JS/pl 10/13/94 JS

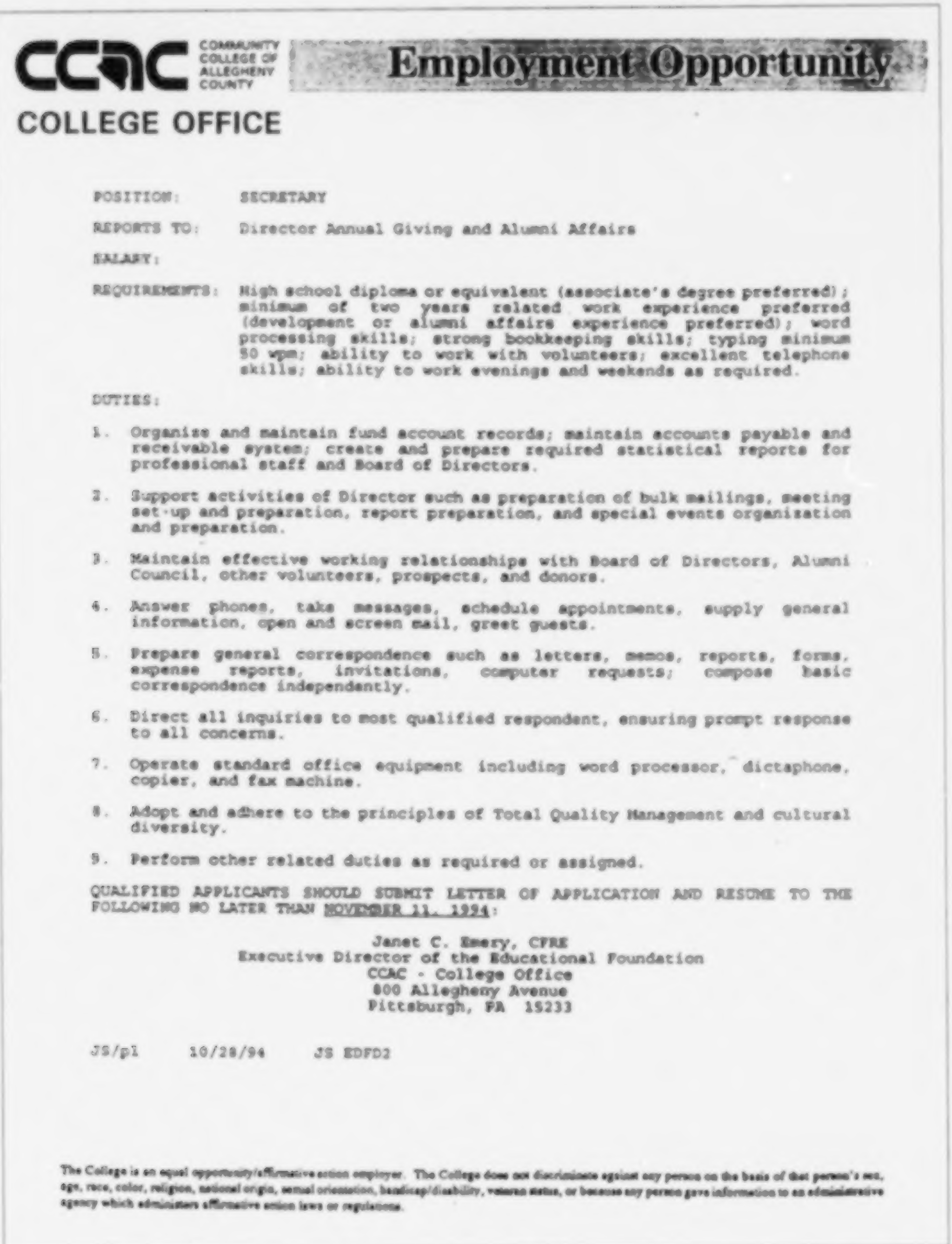
The College is an equal opportunity/affirmative action employer. The College does not discriminate against any person on the basis of that person's sex, age, race, color, religion, national origin, sexual orientation, handicap/disability, veteran status, or because any person gave information to an administrative agency which administers affirmative action laws or regulations.

BEST COPY AVAILABLE

SAMPLE JOB DESCRIPTION

Secretary

COMMUNITY COLLEGE OF ALLEGHENY COUNTY



CCAC COMMUNITY COLLEGE OF ALLEGHENY COUNTY **Employment Opportunity**

COLLEGE OFFICE

POSITION: SECRETARY

REPORTS TO: Director Annual Giving and Alumni Affairs

SALARY:

REQUIREMENTS: High school diploma or equivalent (associate's degree preferred); minimum of two years related work experience preferred (development or alumni affairs experience preferred); word processing skills; strong bookkeeping skills; typing minimum 50 wpm; ability to work with volunteers; excellent telephone skills; ability to work evenings and weekends as required.

DUTIES:

1. Organize and maintain fund account records; maintain accounts payable and receivable system; create and prepare required statistical reports for professional staff and Board of Directors.
2. Support activities of Director such as preparation of bulk mailings, meeting set-up and preparation, report preparation, and special events organization and preparation.
3. Maintain effective working relationships with Board of Directors, Alumni Council, other volunteers, prospects, and donors.
4. Answer phones, take messages, schedule appointments, supply general information, open and screen mail, greet guests.
5. Prepare general correspondence such as letters, memos, reports, forms, expense reports, invitations, computer requests; compose basic correspondence independently.
6. Direct all inquiries to most qualified respondent, ensuring prompt response to all concerns.
7. Operate standard office equipment including word processor, dictaphone, copier, and fax machine.
8. Adopt and adhere to the principles of Total Quality Management and cultural diversity.
9. Perform other related duties as required or assigned.

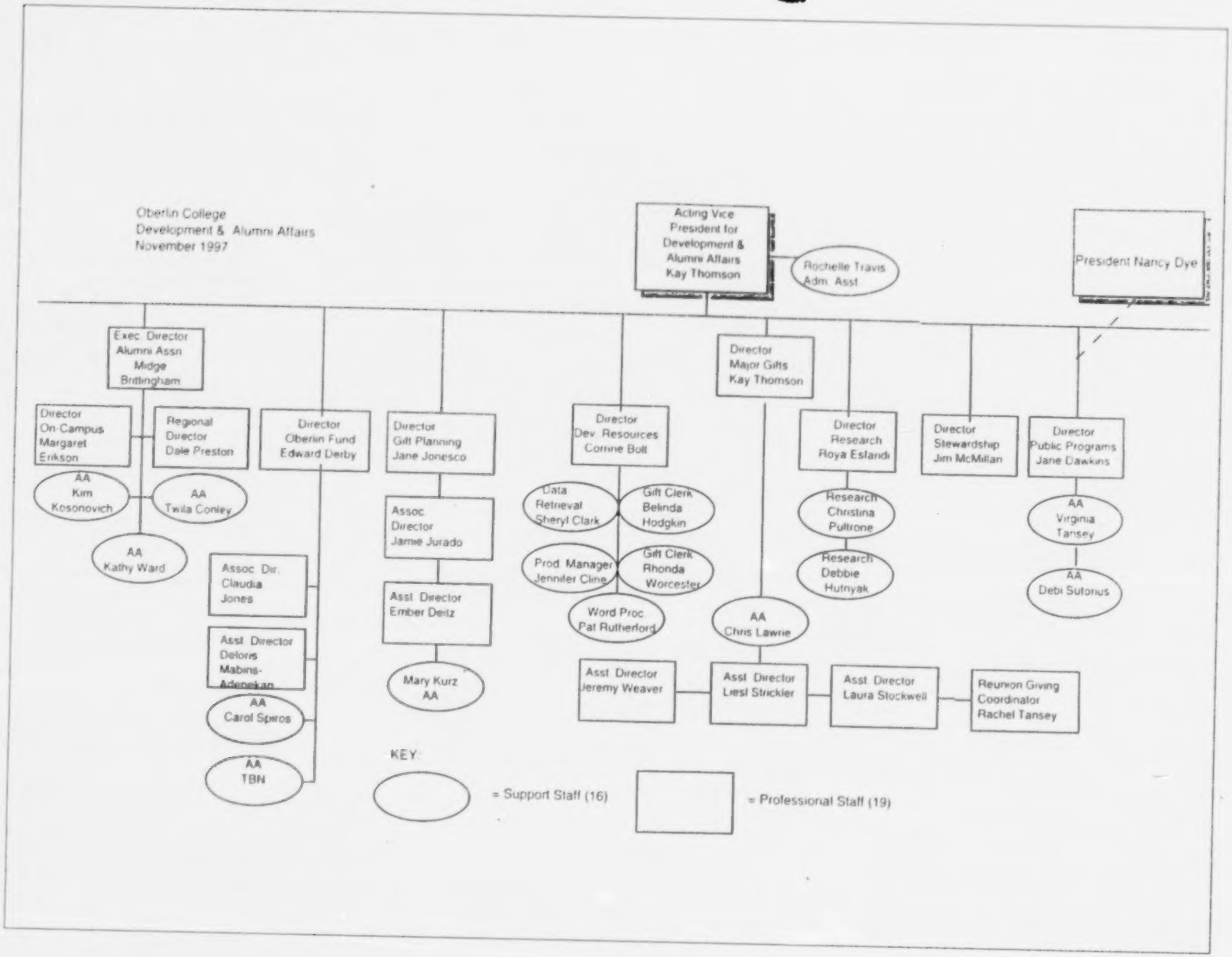
QUALIFIED APPLICANTS SHOULD SUBMIT LETTER OF APPLICATION AND RESUME TO THE FOLLOWING NO LATER THAN NOVEMBER 11, 1994:

Janet C. Emery, CFRE
Executive Director of the Educational Foundation
CCAC - College Office
800 Allegheny Avenue
Pittsburgh, PA 15233

JS/pl 10/28/94 JS EDFD2

The College is an equal opportunity/affirmative action employer. The College does not discriminate against any person on the basis of that person's sex, age, race, color, religion, national origin, sexual orientation, handicap/disability, veteran status, or because any person gave information to an administrative agency which administers affirmative action laws or regulations.

SAMPLE ORGANIZATIONAL CHART
OBERLIN COLLEGE


Oberlin College
Development & Alumni Affairs
November 1997
Acting Vice President for Development & Alumni Affairs Kay Thomson
Rochelle Travis Adm. Asst
President Nancy Dye
Exec. Director Alumni Assn Midge Brittingham
Director On-Campus Margaret Erikson
Regional Director Dale Preston
AA Kim Kosonovich
AA Twila Conley
AA Kathy Ward
Director Oberlin Fund Edward Derby
Assoc. Dir. Claudia Jones
Asst. Director Delores Mabins-Adenekan
AA Carol Spiros
AA TBN
Director Gift Planning Jane Jonesco
Assoc. Director Jamie Jurado
Asst. Director Ember Deitz
Mary Kurz AA
Director Dev. Resources Corinne Bolt
Data Retrieval Sheryl Clark
Gift Clerk Belinda Hodgkin
Prod. Manager Jennifer Cline
Gift Clerk Rhonda Worcester
Word Proc. Pat Rutherford
Director Major Gifts Kay Thomson
AA Chris Lawrie
Asst. Director Jeremy Weaver
Asst. Director Liesl Strickler
Asst. Director Laura Stockwell
Reunion Giving Coordinator Rachel Tansey
Director Research Roya Esfandi
Research Christina Pultrone
Research Debbie Hutnyak
Director Stewardship Jim McMillan
Director Public Programs Jane Dawkins
AA Virginia Tansey
AA Debi Sutorius
KEY:
= Support Staff (16)
= Professional Staff (19)

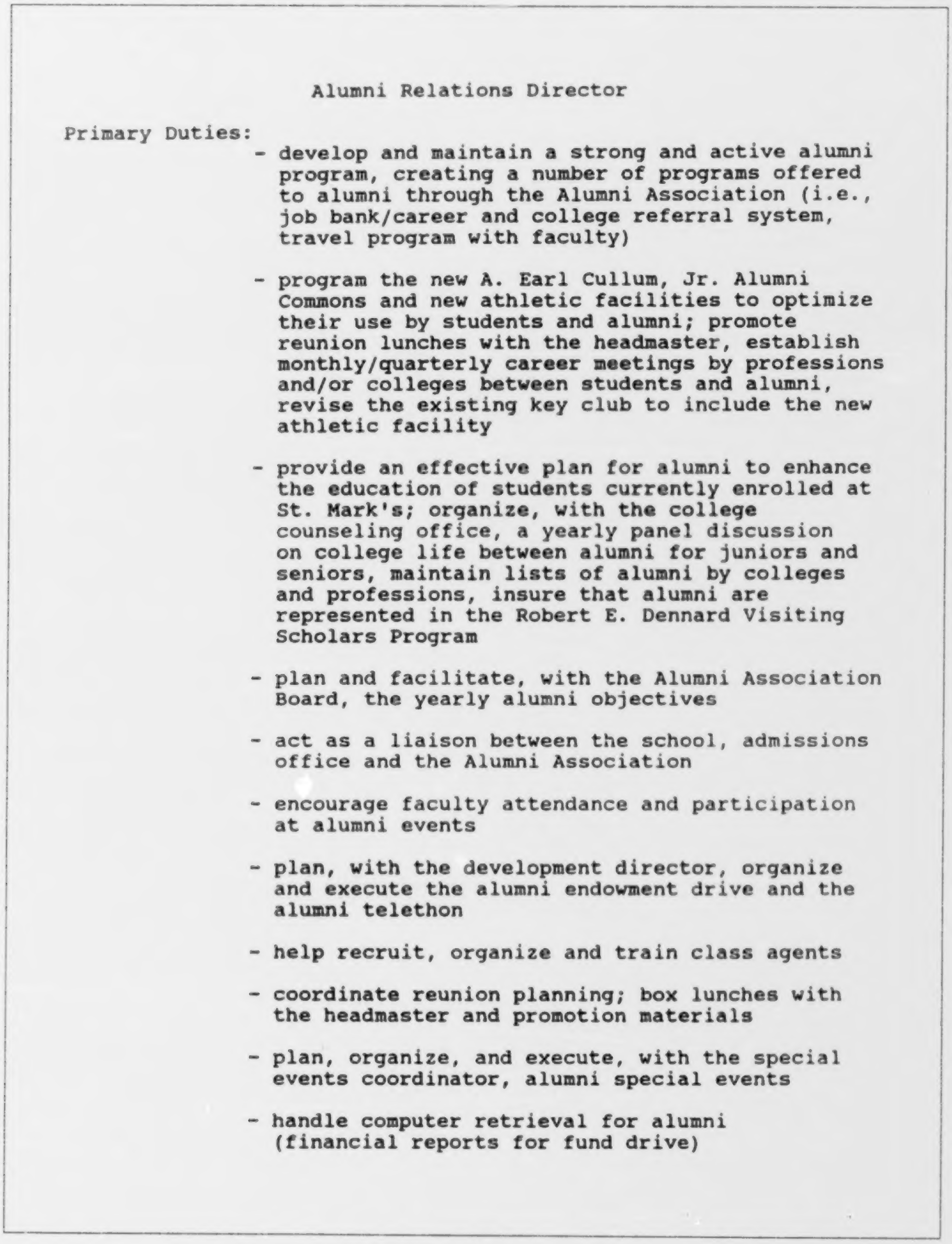
108

109

SAMPLE JOB DESCRIPTION

Director of Alumni Relations

ST. MARKS SCHOOL OF TEXAS



Alumni Relations Director

Primary Duties:

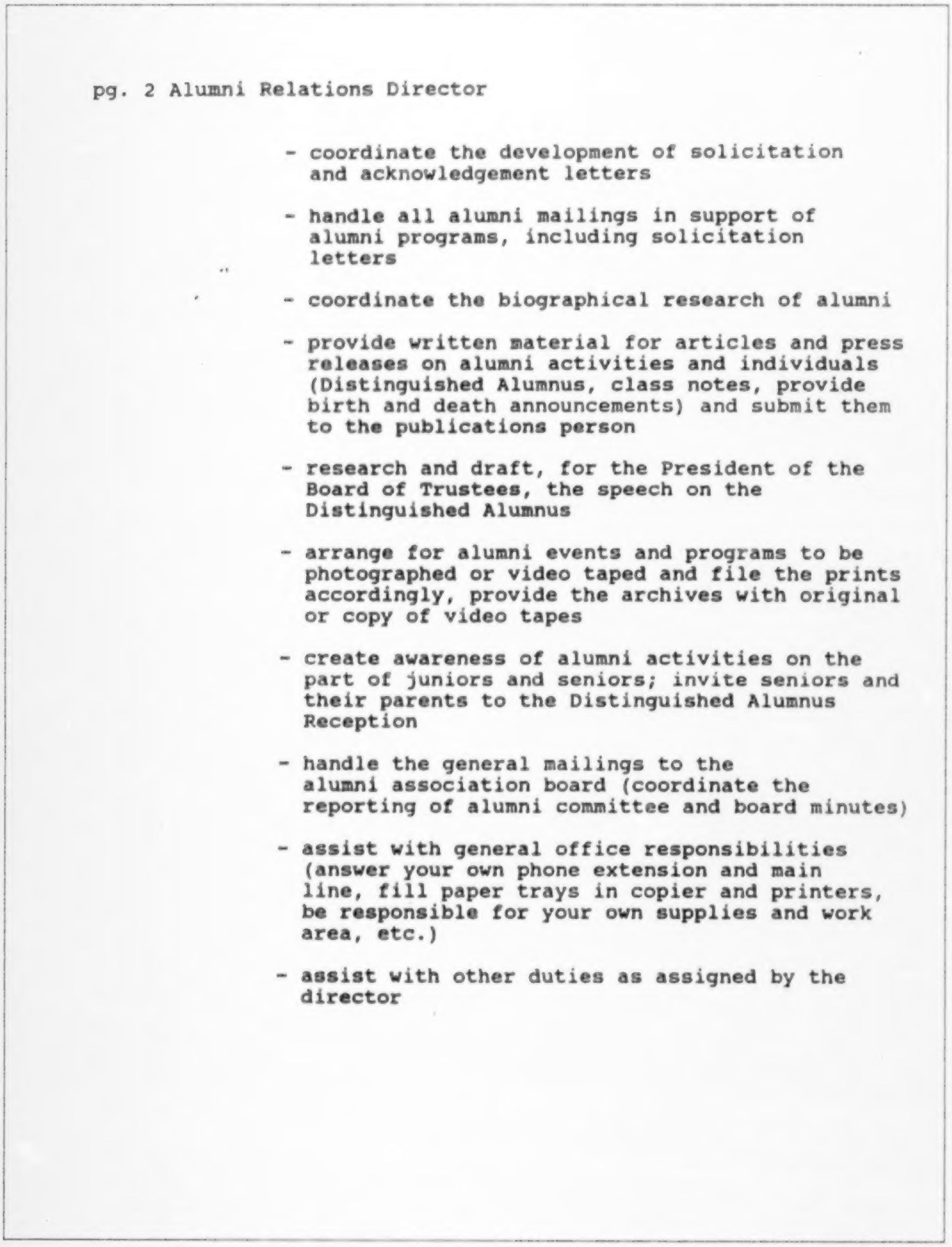
- develop and maintain a strong and active alumni program, creating a number of programs offered to alumni through the Alumni Association (i.e., job bank/career and college referral system, travel program with faculty)
- program the new A. Earl Cullum, Jr. Alumni Commons and new athletic facilities to optimize their use by students and alumni; promote reunion lunches with the headmaster, establish monthly/quarterly career meetings by professions and/or colleges between students and alumni, revise the existing key club to include the new athletic facility
- provide an effective plan for alumni to enhance the education of students currently enrolled at St. Mark's; organize, with the college counseling office, a yearly panel discussion on college life between alumni for juniors and seniors, maintain lists of alumni by colleges and professions, insure that alumni are represented in the Robert E. Dennard Visiting Scholars Program
- plan and facilitate, with the Alumni Association Board, the yearly alumni objectives
- act as a liaison between the school, admissions office and the Alumni Association
- encourage faculty attendance and participation at alumni events
- plan, with the development director, organize and execute the alumni endowment drive and the alumni telethon
- help recruit, organize and train class agents
- coordinate reunion planning; box lunches with the headmaster and promotion materials
- plan, organize, and execute, with the special events coordinator, alumni special events
- handle computer retrieval for alumni (financial reports for fund drive)

Continues

SAMPLE JOB DESCRIPTION

Director of Alumni Relations

ST. MARKS SCHOOL OF TEXAS



pg. 2 Alumni Relations Director

- coordinate the development of solicitation and acknowledgement letters
- handle all alumni mailings in support of alumni programs, including solicitation letters
- coordinate the biographical research of alumni
- provide written material for articles and press releases on alumni activities and individuals (Distinguished Alumnus, class notes, provide birth and death announcements) and submit them to the publications person
- research and draft, for the President of the Board of Trustees, the speech on the Distinguished Alumnus
- arrange for alumni events and programs to be photographed or video taped and file the prints accordingly, provide the archives with original or copy of video tapes
- create awareness of alumni activities on the part of juniors and seniors; invite seniors and their parents to the Distinguished Alumnus Reception
- handle the general mailings to the alumni association board (coordinate the reporting of alumni committee and board minutes)
- assist with general office responsibilities (answer your own phone extension and main line, fill paper trays in copier and printers, be responsible for your own supplies and work area, etc.)
- assist with other duties as assigned by the director

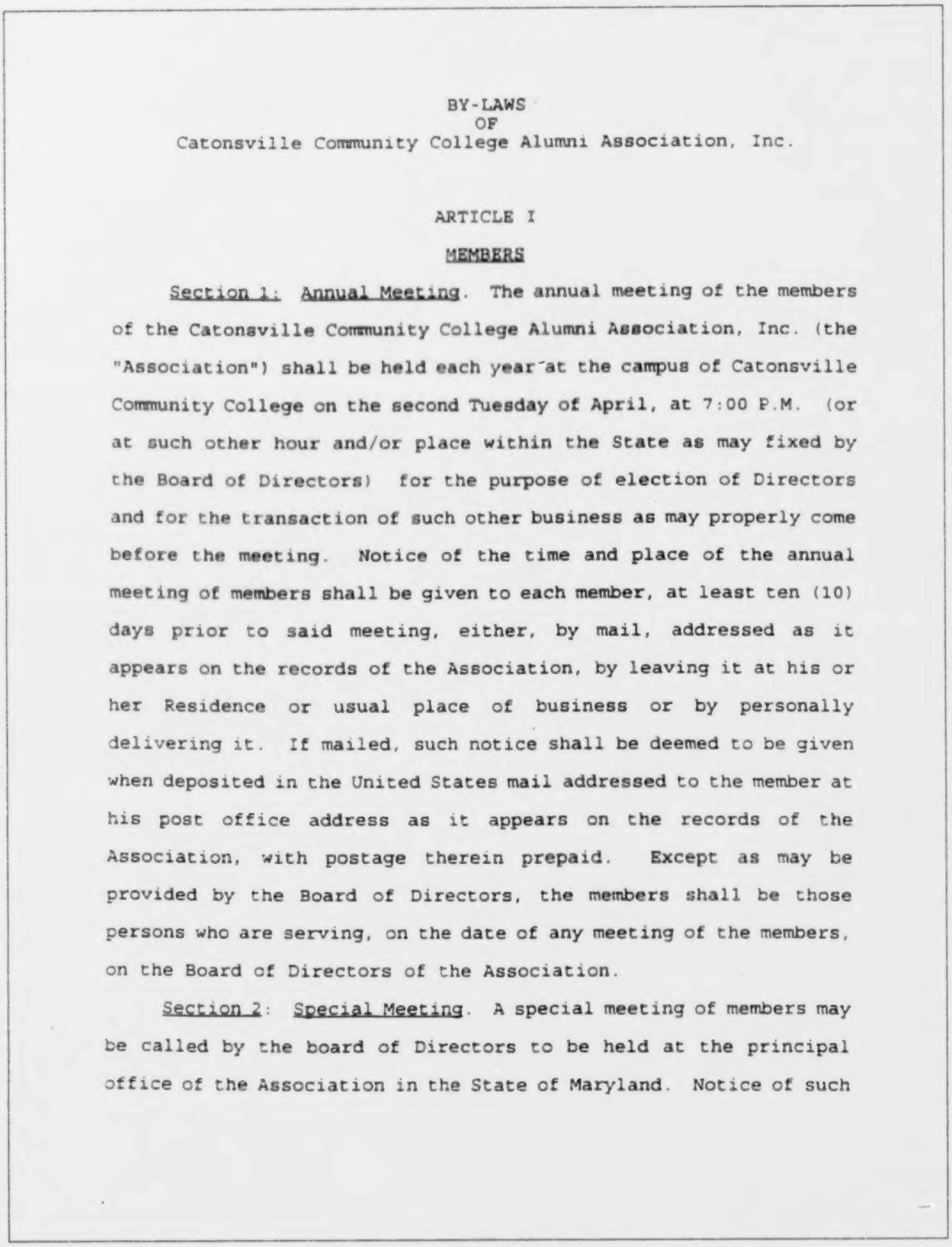
APPENDIX III

CONSTITUTIONS AND BYLAWS FOR THE ALUMNI ASSOCIATION

Catonsville Community College
Colorado College
Oberlin College
Western Illinois University

SAMPLE BYLAWS

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION



BY-LAWS
OF
Catonsville Community College Alumni Association, Inc.

ARTICLE I

MEMBERS

Section 1: Annual Meeting. The annual meeting of the members of the Catonsville Community College Alumni Association, Inc. (the "Association") shall be held each year at the campus of Catonsville Community College on the second Tuesday of April, at 7:00 P.M. (or at such other hour and/or place within the State as may fixed by the Board of Directors) for the purpose of election of Directors and for the transaction of such other business as may properly come before the meeting. Notice of the time and place of the annual meeting of members shall be given to each member, at least ten (10) days prior to said meeting, either, by mail, addressed as it appears on the records of the Association, by leaving it at his or her Residence or usual place of business or by personally delivering it. If mailed, such notice shall be deemed to be given when deposited in the United States mail addressed to the member at his post office address as it appears on the records of the Association, with postage therein prepaid. Except as may be provided by the Board of Directors, the members shall be those persons who are serving, on the date of any meeting of the members, on the Board of Directors of the Association.

Section 2: Special Meeting. A special meeting of members may be called by the board of Directors to be held at the principal office of the Association in the State of Maryland. Notice of such

Continues

BEST COPY AVAILABLE

special meeting shall be given in the same manner as provided in the case of annual meetings.

Section 3: Quorum. At any meeting of the members, the presence in person or by proxy of members entitled to cast a majority of all the votes entitled to be cast at such meeting shall constitute a quorum; but this section shall not affect any requirement under any statute or the character for the vote necessary for the adoptionof any measure. If, however, such quorum shall not be present at any meeting of the members, the members entitled to vote at such meeting, present in person or by proxy, shall have power to adjourn the meeting from time to time to a date not more than 120 days after the original record date without notice other than announcement at the meeting until such quorum shall be present. At such adjourned meeting at which a quorum shall be present, any business may be transacted which might have been transacted at the meeting as originally notified.

Section 4: Voting. Voting by members may be in person or by proxy (proxies, to be honored, must be submitted in accordance with the applicable Maryland law) and each member shall be entitled to one vote. Except in cases in which it is by statute, the Articles of Incorporation, or otherwise provided by these Bylaws, a majority of the votes cast shall be sufficient to elect Directors and pass any measure.

Continues

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION

ARTICLE II

NON-VOTING MEMBERS

Section 1: Alumni Members: The Association shall provide through this Association an opportunity for former students of Catonsville Community College, including those whose education was provided at the Carroll County Community College campus, to affiliate themselves with others who attended classes at Catonsville Community College. Each former or current student of Catonsville Community college who meets the requirements for becoming an Alumni Member as they may be from time-to-time and wishes to avail himself or herself of such an opportunity shall (1) apply to the Board of Directors, or its designee, to be an "Alumni Member" and meet such requirements as amy be imposed from time-to-time by the Board upon persons seeking to be Alumni Members and (2) pay annually, or at such other intervals as may be approved by the Directors, Alumni Member dues in such amount as may be approved by the Directors.

Section 2: Honorary Members: Upon the recommendation of the board od Directors, or any Alumni Member, the Board may consider for Honorary Membership in the Association persons who have performed outstanding community or civic service or who have otherwise made significant contributions to Catonsville Community College in assisting it in meeting intellectual, service or financial goals and obligations.

Continues

BEST COPY AVAILABLE

SAMPLE BYLAWS

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION

ARTICLE III

BOARD OF DIRECTORS

Section 1: Management. The management and control of the business of the Association shall be vested in a Board of Directors, consisting of not less than eighteen (18) members and no more than twenty-five (25) members, each of whom shall be Alumni Members or Honorary Members and who shall be elected at the meeting of members for a term of one (1) year, and who shall hold office until their successors are duly elected and qualify.

Section 2: Vacancies. Any vacancies on the Board of Directors caused by resignation, death or otherwise may, unless otherwise provided in the Articles of Incorporation, be filled by the remaining Directors at a special meeting called for that purpose, or by the members at any regular or special meeting held prior to the filling of such vacancy by the Board as above provided. The person so chosen as a Director shall hold office until the next annual meeting of the members, or until his successor is duly elected and qualifies. Directors shall be deemed to have resigned in the event of their failure or inability to attend three regularly scheduled meetings of the Board.

Section 3: Annual Meetings. An annual meeting of the Board of Directors shall/immediately follow the annual meeting of members each year. No notice of the annual meeting need be given to the Directors.

Section 4: Special Meetings. Special meetings of the Board of Directors may be called at any time by the President or by any five Directors. These meetings shall be held at the principal

Continues

office of the Association in the State of Maryland, or at such other place or places as the Directors may from time to time designate. Notice of special meetings of the Board of Directors shall be given to each Director at least forty-eight (48) hours prior to the meeting by service upon the Directors, either, by telegram, by letter or by personal notice, including telephone notice. Notice of a special meeting shall include notice of the purpose for which such a meeting is called.

Section 5: Quorum. A quorum for the transaction of business at every meeting of the Board of Directors shall consist of a majority of the Board of Directors. The majority vote of those present at such a meeting shall be sufficient to pass any measure or resolution, unless otherwise provided by the laws of this State, he Articles of Incorporation or these Bylaws.

Continues

SAMPLE BYLAWS

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION

ARTICLE III

OFFICERS

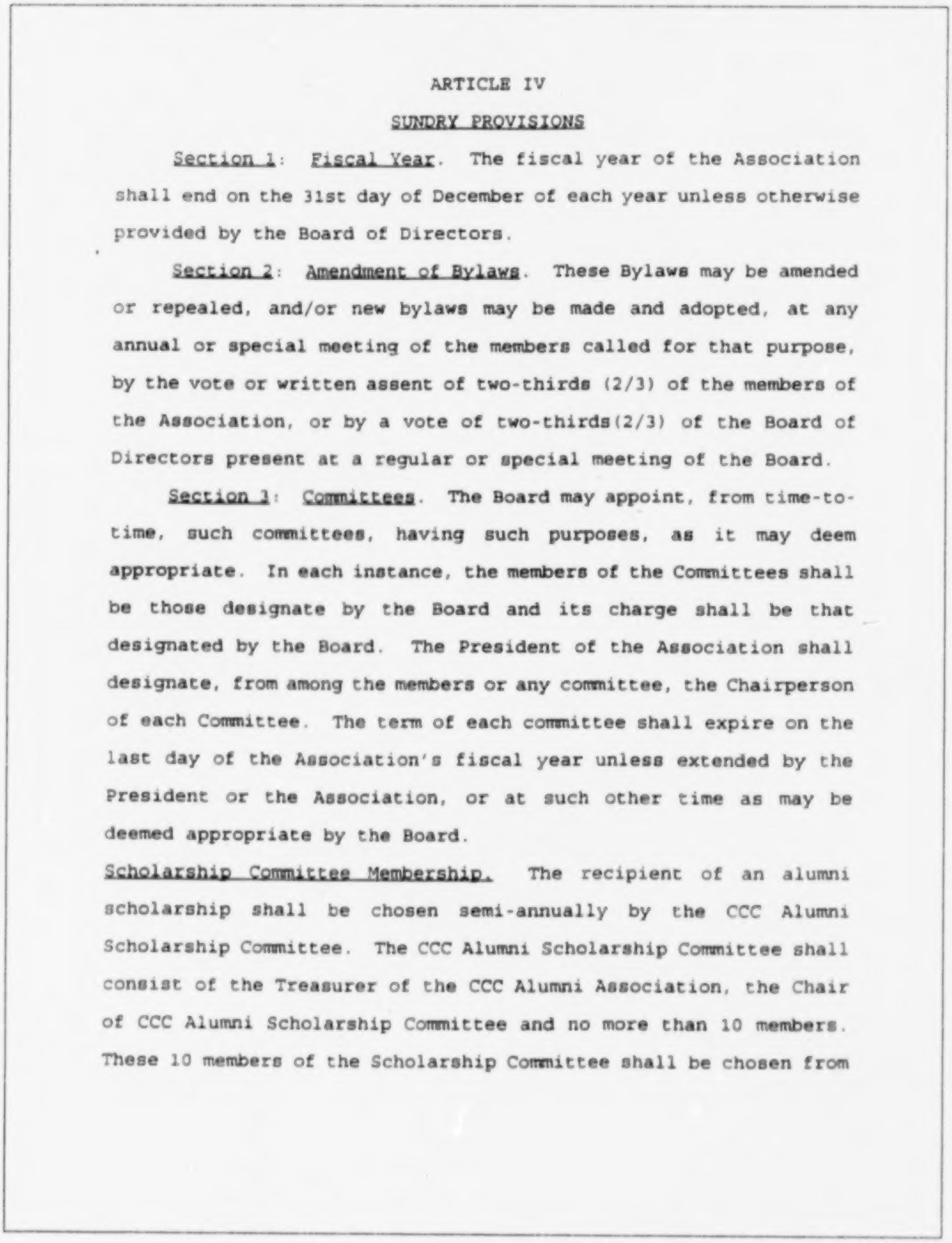
Section 1: General Provisions. The officers of the Association shall consist of a President, Vice President, Secretary and Treasurer. The officers of the Association shall be elected annually by the Board of Directors at the first meeting of the Board of Directors held after each annual meeting of the members. If the election of officers shall not be held at such meeting, such election shall be held as soon thereafter as may be convenient. The officers shall hold office until their successors are duly elected and qualify. The office of Secretary and the office of Treasurer may be held by the same person. Any vacancies in any office may be filled by the Board of Directors at any regular or special meeting. The duties of the officers shall be such as are usually imposed upon such officials of corporations and as are required by law, and such as may be assigned to them respectfully by the Board of Directors from time to time.

Section 2: Compensation. The officers or Directors of the Association shall receive no compensation for any services performed by such persons in their capacity as officers or Directors.

Continues

SAMPLE BYLAWS

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION



ARTICLE IV

SUNDRY PROVISIONS

Section 1: Fiscal Year. The fiscal year of the Association shall end on the 31st day of December of each year unless otherwise provided by the Board of Directors.

Section 2: Amendment of Bylaws. These Bylaws may be amended or repealed, and/or new bylaws may be made and adopted, at any annual or special meeting of the members called for that purpose, by the vote or written assent of two-thirds (2/3) of the members of the Association, or by a vote of two-thirds(2/3) of the Board of Directors present at a regular or special meeting of the Board.

Section 3: Committees. The Board may appoint, from time-to-time, such committees, having such purposes, as it may deem appropriate. In each instance, the members of the Committees shall be those designate by the Board and its charge shall be that designated by the Board. The President of the Association shall designate, from among the members or any committee, the Chairperson of each Committee. The term of each committee shall expire on the last day of the Association's fiscal year unless extended by the President or the Association, or at such other time as may be deemed appropriate by the Board.

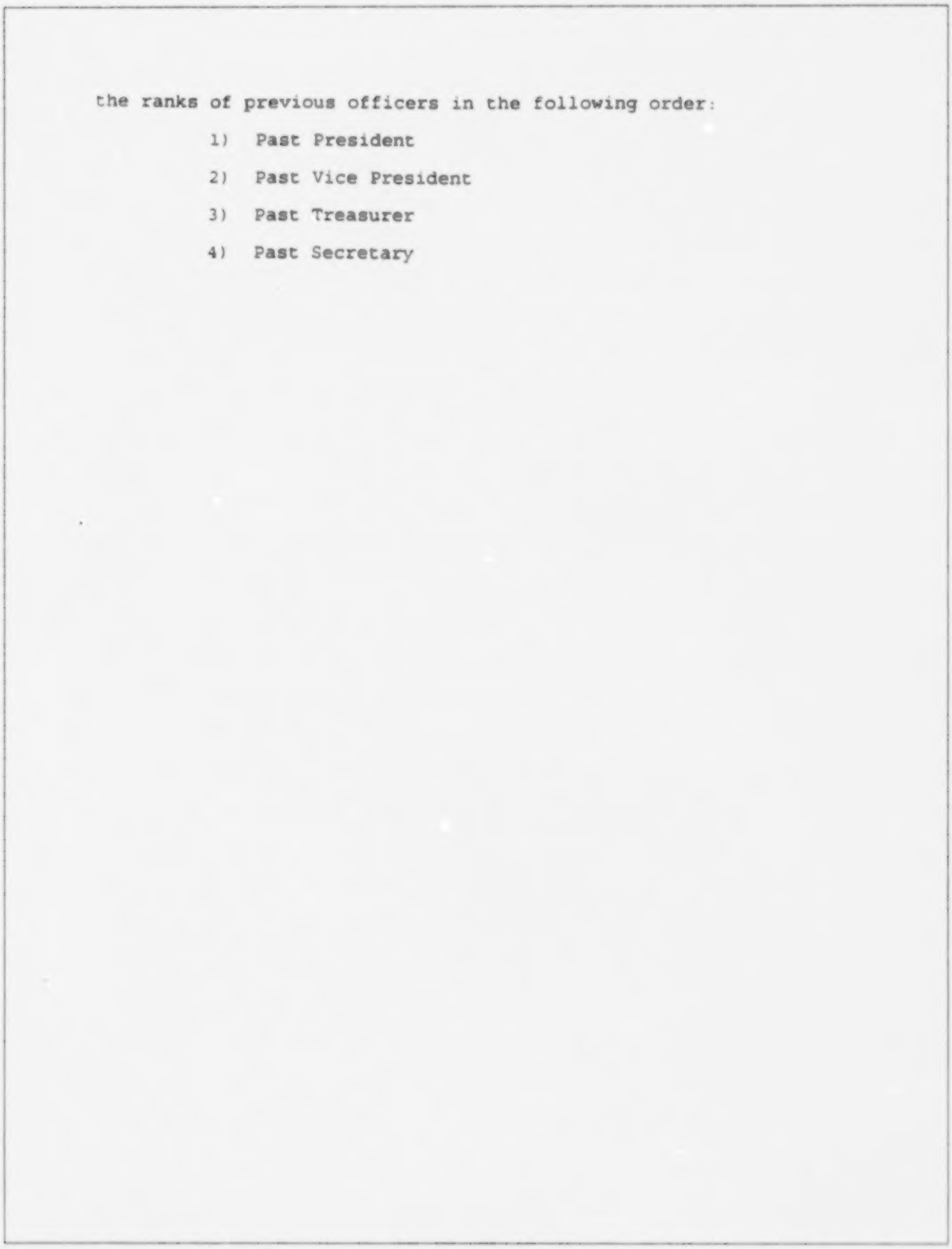
Scholarship Committee Membership. The recipient of an alumni scholarship shall be chosen semi-annually by the CCC Alumni Scholarship Committee. The CCC Alumni Scholarship Committee shall consist of the Treasurer of the CCC Alumni Association, the Chair of CCC Alumni Scholarship Committee and no more than 10 members. These 10 members of the Scholarship Committee shall be chosen from

Continues

BEST COPY AVAILABLE

SAMPLE BYLAWS

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION



the ranks of previous officers in the following order:

1) Past President
2) Past Vice President
3) Past Treasurer
4) Past Secretary

Continues

SAMPLE BYLAWS

CATONSVILLE COMMUNITY COLLEGE ALUMNI ASSOCIATION

ARTICLE V

INDEMNIFICATION

Section 1: Actions In General. The Association shall indemnify (i) any individual who is a present or former Director or officer acting on behalf of the Association; or (ii) any individual who serves or has served in another corporation, partnership, joint venture, trust, employee benefit plan or any other enterprise as a trustee or officer, or as a partner or trustee of such partnership or employee benefit plan, at the request of the Association and who by reason of service in that capacity was, or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative, to the full extent permitted under the applicable provisions of the Corporations and Association Article of the Annotated Code of Maryland. The Association may, with the approval of its Board of Directors, provide such indemnification for a person who formerly served the association in any of the capacities described in (i) or (ii) above and for any employee or agent of the Association.

Section 2: Advancement of Expenses. Reasonable expenses incurred by a Trustee or officer who is or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative, shall be paid or reimbursed by the Association, in advance of the final disposition of the proceeding upon receipt by the Association of (i) a written Affirmation by the party seeking indemnification that he has a good faith belief that the standard

Continues

BEST COPY AVAILABLE

of conduct necessary for indemnification by the Association as authorized herein has been met, and (ii) a written undertaking by or on behalf of the party seeking indemnification to repay the amount if it shall ultimately be determined that the standard of conduct has not been met.

The foregoing are certified as the Bylaws of the Association adopted by the Board of Directors on ________________.

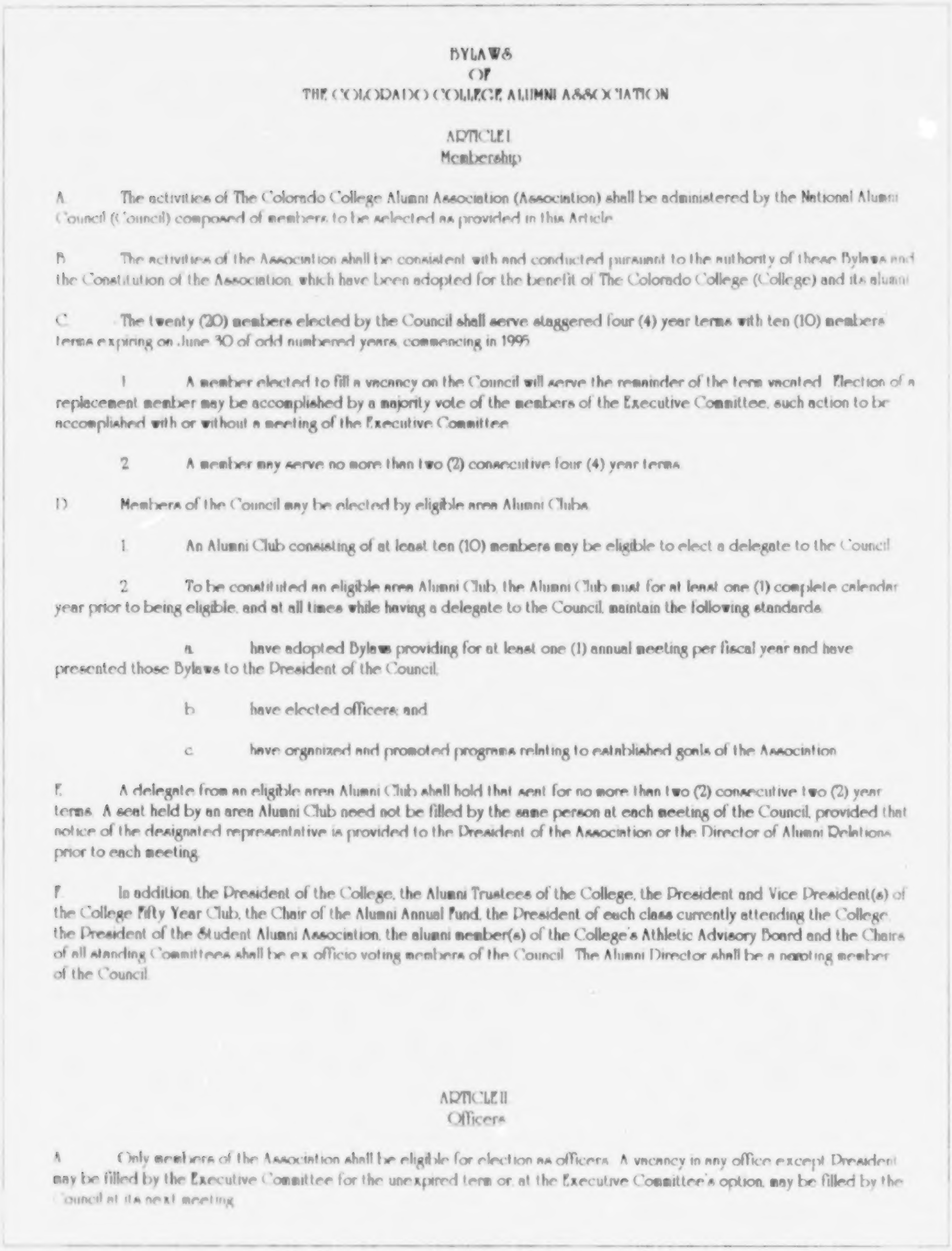
____

________________, Secretary

Amended: November 14, 1994

SAMPLE BYLAWS

COLORADO COLLEGE ALUMNI ASSOCIATION



BYLAWS
OF
THE COLORADO COLLEGE ALUMNI ASSOCIATION

ARTICLE I
Membership

A. The activities of The Colorado College Alumni Association (Association) shall be administered by the National Alumni Council (Council) composed of members to be selected as provided in this Article.

B. The activities of the Association shall be consistent with and conducted pursuant to the authority of these Bylaws and the Constitution of the Association, which have been adopted for the benefit of The Colorado College (College) and its alumni.

C. The twenty (20) members elected by the Council shall serve staggered four (4) year terms with ten (10) members terms expiring on June 30 of odd numbered years, commencing in 1995.

1. A member elected to fill a vacancy on the Council will serve the remainder of the term vacated. Election of a replacement member may be accomplished by a majority vote of the members of the Executive Committee, such action to be accomplished with or without a meeting of the Executive Committee.

2. A member may serve no more than two (2) consecutive four (4) year terms.

D. Members of the Council may be elected by eligible area Alumni Clubs.

1. An Alumni Club consisting of at least ten (10) members may be eligible to elect a delegate to the Council.

2. To be constituted an eligible area Alumni Club, the Alumni Club must for at least one (1) complete calendar year prior to being eligible, and at all times while having a delegate to the Council, maintain the following standards:

a. have adopted Bylaws providing for at least one (1) annual meeting per fiscal year and have presented those Bylaws to the President of the Council;

b. have elected officers; and

c. have organized and promoted programs relating to established goals of the Association.

E. A delegate from an eligible area Alumni Club shall hold that seat for no more than two (2) consecutive two (2) year terms. A seat held by an area Alumni Club need not be filled by the same person at each meeting of the Council, provided that notice of the designated representative is provided to the President of the Association or the Director of Alumni Relations prior to each meeting.

F. In addition, the President of the College, the Alumni Trustees of the College, the President and Vice President(s) of the College Fifty Year Club, the Chair of the Alumni Annual Fund, the President of each class currently attending the College, the President of the Student Alumni Association, the alumni member(s) of the College's Athletic Advisory Board and the Chairs of all standing Committees shall be ex officio voting members of the Council. The Alumni Director shall be a nonvoting member of the Council.

ARTICLE II
Officers

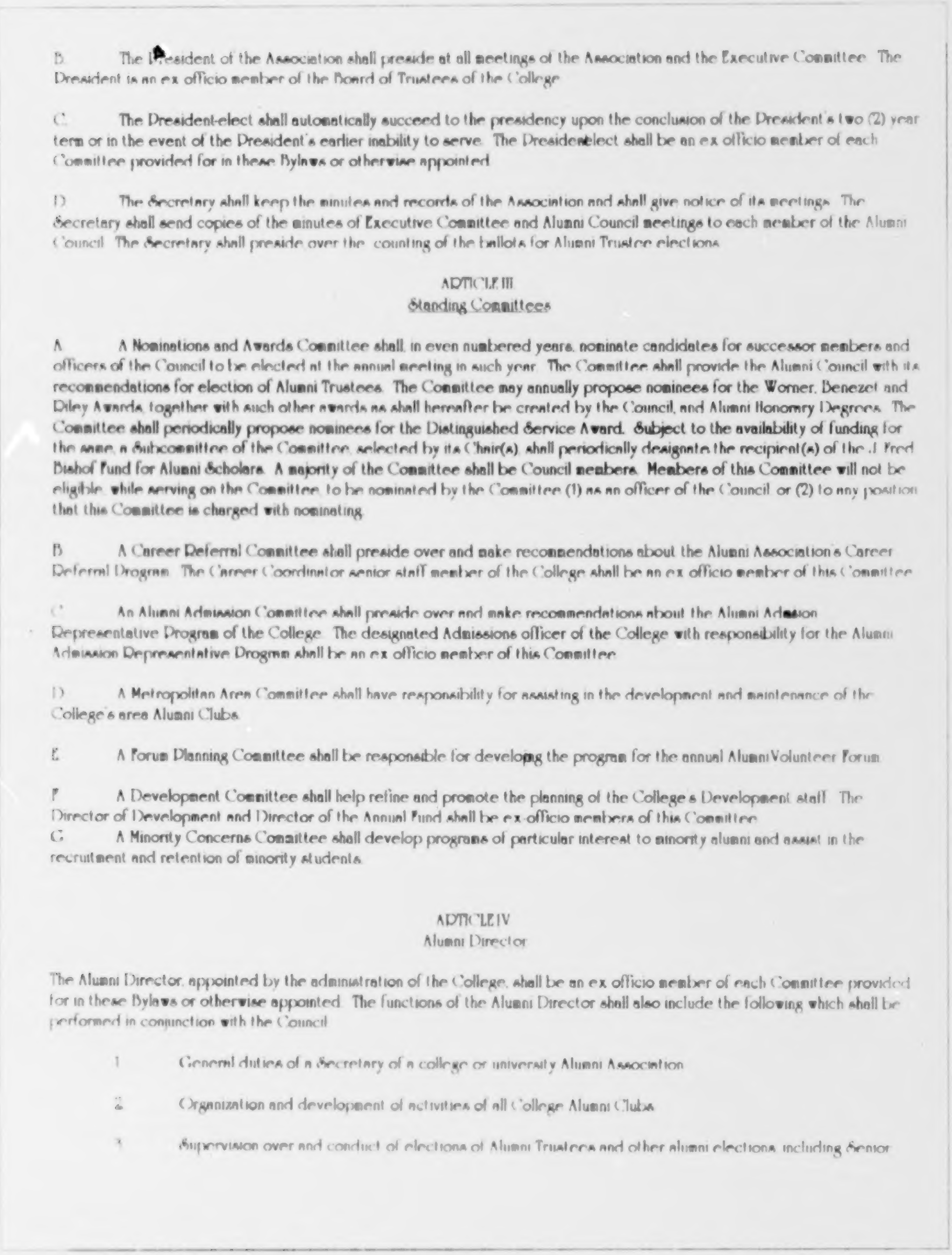
A. Only members of the Association shall be eligible for election as officers. A vacancy in any office except President may be filled by the Executive Committee for the unexpired term or, at the Executive Committee's option, may be filled by the Council at its next meeting.

Continues

BEST COPY AVAILABLE

SAMPLE BYLAWS

COLORADO COLLEGE ALUMNI ASSOCIATION



B. The President of the Association shall preside at all meetings of the Association and the Executive Committee. The President is an ex officio member of the Board of Trustees of the College.

C. The President-elect shall automatically succeed to the presidency upon the conclusion of the President's two (2) year term or in the event of the President's earlier inability to serve. The President-elect shall be an ex officio member of each Committee provided for in these Bylaws or otherwise appointed.

D. The Secretary shall keep the minutes and records of the Association and shall give notice of its meetings. The Secretary shall send copies of the minutes of Executive Committee and Alumni Council meetings to each member of the Alumni Council. The Secretary shall preside over the counting of the ballots for Alumni Trustee elections.

ARTICLE III
Standing Committees

A. A Nominations and Awards Committee shall, in even numbered years, nominate candidates for successor members and officers of the Council to be elected at the annual meeting in such year. The Committee shall provide the Alumni Council with its recommendations for election of Alumni Trustees. The Committee may annually propose nominees for the Worner, Benezet and Riley Awards, together with such other awards as shall hereafter be created by the Council, and Alumni Honorary Degrees. The Committee shall periodically propose nominees for the Distinguished Service Award. Subject to the availability of funding for the same, a Subcommittee of the Committee, selected by its Chair(s), shall periodically designate the recipient(s) of the J. Fred Bishof Fund for Alumni Scholars. A majority of the Committee shall be Council members. Members of this Committee will not be eligible, while serving on the Committee, to be nominated by the Committee (1) as an officer of the Council, or (2) to any position that this Committee is charged with nominating.

B. A Career Referral Committee shall preside over and make recommendations about the Alumni Association's Career Referral Program. The Career Coordinator senior staff member of the College shall be an ex officio member of this Committee.

C. An Alumni Admission Committee shall preside over and make recommendations about the Alumni Admission Representative Program of the College. The designated Admissions officer of the College with responsibility for the Alumni Admission Representative Program shall be an ex officio member of this Committee.

D. A Metropolitan Area Committee shall have responsibility for assisting in the development and maintenance of the College's area Alumni Clubs.

E. A Forum Planning Committee shall be responsible for developing the program for the annual Alumni Volunteer Forum.

F. A Development Committee shall help refine and promote the planning of the College's Development staff. The Director of Development and Director of the Annual Fund shall be ex-officio members of this Committee.
G. A Minority Concerns Committee shall develop programs of particular interest to minority alumni and assist in the recruitment and retention of minority students.

ARTICLE IV
Alumni Director

The Alumni Director, appointed by the administration of the College, shall be an ex officio member of each Committee provided for in these Bylaws or otherwise appointed. The functions of the Alumni Director shall also include the following which shall be performed in conjunction with the Council:

1. General duties of a Secretary of a college or university Alumni Association.

2. Organization and development of activities of all College Alumni Clubs.

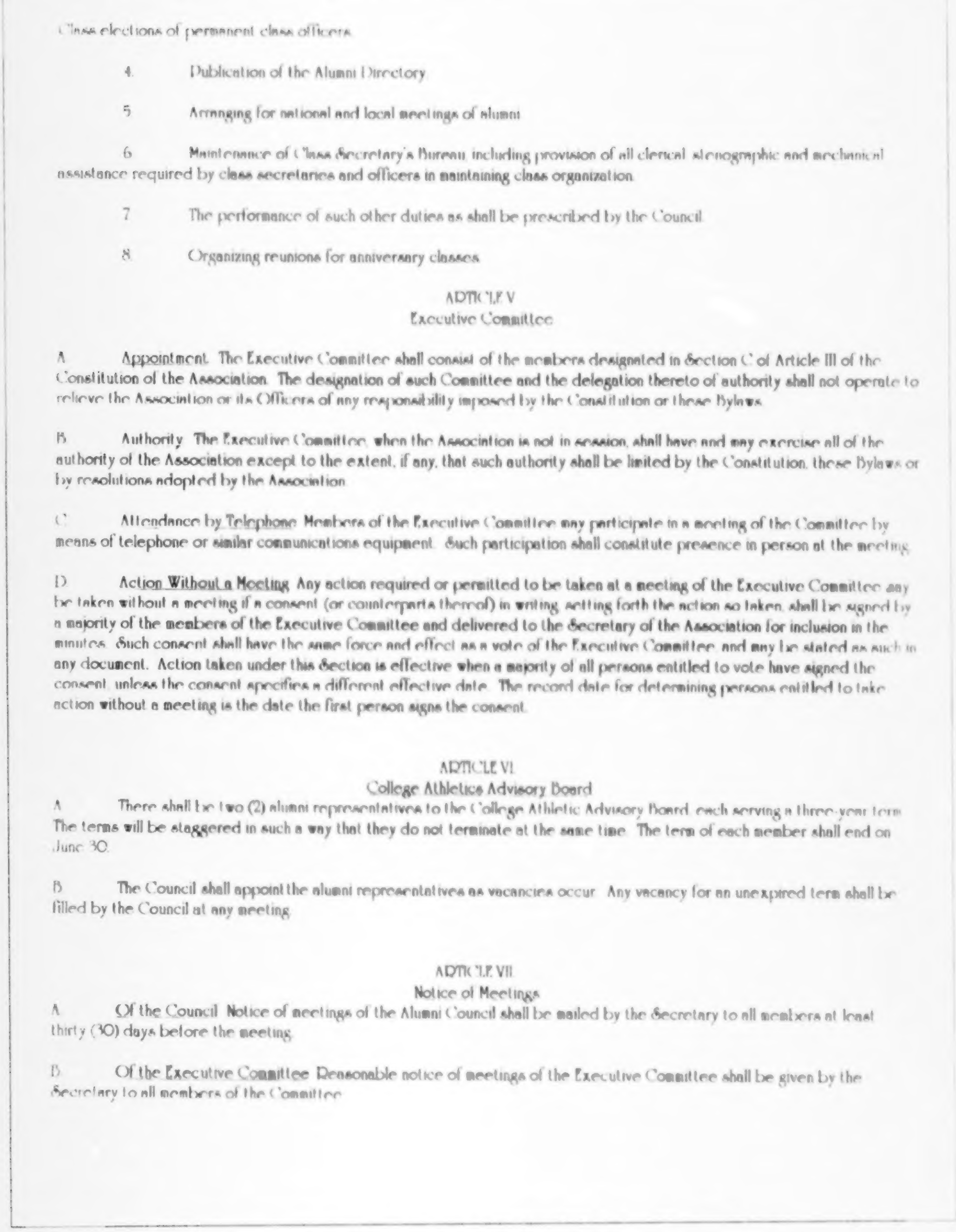
3. Supervision over and conduct of elections of Alumni Trustees and other alumni elections, including Senior

Continues

BEST COPY AVAILABLE

SAMPLE BYLAWS

COLORADO COLLEGE ALUMNI ASSOCIATION



Class elections of permanent class officers.

4. Publication of the Alumni Directory.

5. Arranging for national and local meetings of alumni.

6. Maintenance of Class Secretary's Bureau, including provision of all clerical, stenographic and mechanical assistance required by class secretaries and officers in maintaining class organization.

7. The performance of such other duties as shall be prescribed by the Council.

8. Organizing reunions for anniversary classes.

ARTICLE V
Executive Committee

A. Appointment. The Executive Committee shall consist of the members designated in Section C of Article III of the Constitution of the Association. The designation of such Committee and the delegation thereto of authority shall not operate to relieve the Association or its Officers of any responsibility imposed by the Constitution or these Bylaws.

B. Authority. The Executive Committee, when the Association is not in session, shall have and may exercise all of the authority of the Association except to the extent, if any, that such authority shall be limited by the Constitution, these Bylaws or by resolutions adopted by the Association.

C. Attendance by Telephone. Members of the Executive Committee may participate in a meeting of the Committee by means of telephone or similar communications equipment. Such participation shall constitute presence in person at the meeting.

D. Action Without a Meeting. Any action required or permitted to be taken at a meeting of the Executive Committee may be taken without a meeting if a consent (or counterparts thereof) in writing, setting forth the action so taken, shall be signed by a majority of the members of the Executive Committee and delivered to the Secretary of the Association for inclusion in the minutes. Such consent shall have the same force and effect as a vote of the Executive Committee, and may be stated as such in any document. Action taken under this Section is effective when a majority of all persons entitled to vote have signed the consent, unless the consent specifies a different effective date. The record date for determining persons entitled to take action without a meeting is the date the first person signs the consent.

ARTICLE VI
College Athletics Advisory Board

A. There shall be two (2) alumni representatives to the College Athletic Advisory Board, each serving a three-year term. The terms will be staggered in such a way that they do not terminate at the same time. The term of each member shall end on June 30.

B. The Council shall appoint the alumni representatives as vacancies occur. Any vacancy for an unexpired term shall be filled by the Council at any meeting.

ARTICLE VII
Notice of Meetings

A. Of the Council. Notice of meetings of the Alumni Council shall be mailed by the Secretary to all members at least thirty (30) days before the meeting.

B. Of the Executive Committee. Reasonable notice of meetings of the Executive Committee shall be given by the Secretary to all members of the Committee.

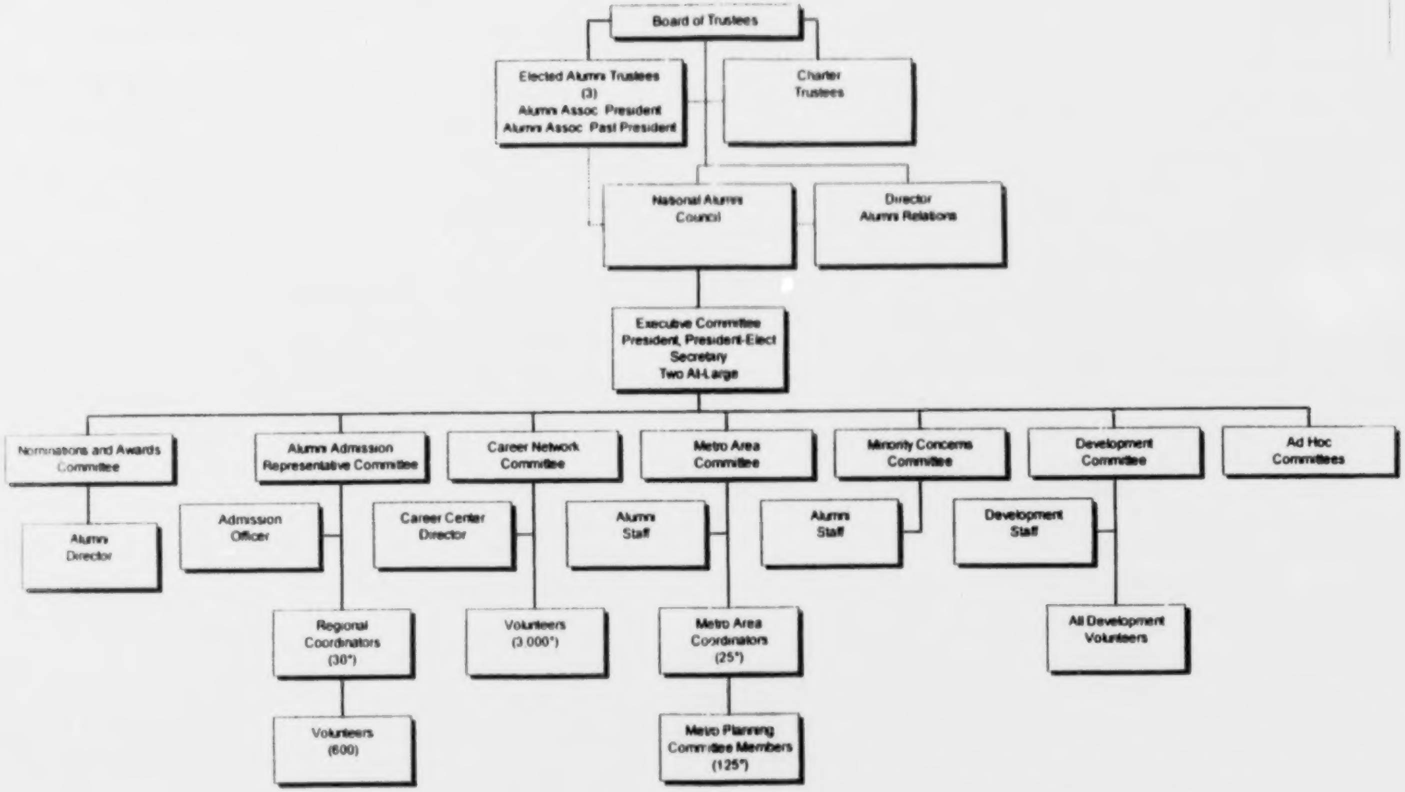
Continues

BEST COPY AVAILABLE

COLORADO COLLEGE NATIONAL ALUMNI COUNCIL

ORGANIZATIONAL CHART

NATIONAL ALUMNI COUNCIL ORGANIZATIONAL CHART


Board of Trustees
Elected Alumni Trustees (3) Alumni Assoc. President Alumni Assoc. Past President
Charter Trustees
National Alumni Council
Director Alumni Relations
Executive Committee President, President-Elect Secretary Two At-Large
Nominations and Awards Committee
Alumni Director
Alumni Admission Representative Committee
Admission Officer
Regional Coordinators (30*)
Volunteers (600)
Career Network Committee
Career Center Director
Volunteers (3,000*)
Metro Area Committee
Alumni Staff
Metro Area Coordinators (25*)
Metro Planning Committee Members (125*)
Minority Concerns Committee
Alumni Staff
Development Committee
Development Staff
All Development Volunteers
Ad Hoc Committees

*approximate number

BEST COPY AVAILABLE

SAMPLE BYLAWS

COLORADO COLLEGE NATIONAL ALUMNI COUNCIL

NAC STANDING COMMITTEES

The President-elect of the NAC is an ex-officio member of all committees. The president -elect keeps the Executive Committee advised of important developments within committees and stays in touch with the Director of Alumni Relations regarding committee activity. As necessary, the President-elect works directly with committee chairs to encourage appropriate work.

All College departments working with committees keep the President-elect and the Director of Alumni Relations advised of activities.

The chairs of all standing committees serve as ex-officio members of the NAC and are appointed by the President of the NAC in consultation with the Director of Alumni Relations and other appropriate College staff.

NAC ALUMNI ADMISSION REPRESENTATIVES COMMITTEE

The Alumni Admission Committee advises, refines and helps to implement the Alumni Admission Representative (AAR) program.

The Committee assists the Admission Office in managing the existing AAR program, and by investigating and suggesting new opportunities for alumni assistance in the recruiting of qualified and prospective students. It works with appropriate members of the Minority Concerns Committee to develop special efforts in minority recruitment. The committee reports to the NAC twice each year.

Members of the committee are appointed by the President of the NAC in consultation with the Director of Alumni Relations, the Assistant Director of Admission (who is in charge of the AAR program) and the committee chair. The Assistant Director of Admission is an ex-officio member of the committee.

NAC CAREER REFERRAL COMMITTEE

The Career Referral Committee advises, refines and helps to implement the Alumni Career Referral program and other career-related programs for current students and alumni.

By establishing a network of volunteers, the committee works with the Career Center to assist and support students and alumni of the College. The committee works with appropriate members of the Minority Concerns Committee to develop any special ways to enlist support of minority alumni in helping minority students.

It is not the intention of the committee or the program to provide jobs for alumni, but rather to form a network of contacts that will assist students and alumni in their search for information about jobs, the career search process, graduate schools and possible internships.

The committee works with the Director of the College's Career Center who in turn communicates with the Director of Alumni Relations. The committee is appointed by the President and Executive Committee of the NAC in consultation with the Director of Alumni Relations, the Director of the Career Center and the committee chair. The chair of the committee is an ex-officio member of the NAC.

Continues

SAMPLE BYLAWS

COLORADO COLLEGE NATIONAL ALUMNI COUNCIL

The committee reports to the NAC twice each year. The Director of the Career Center is an ex-officio member of the committee.

NAC DEVELOPMENT COMMITTEE

The Development Committee is chaired (or co-chaired) by members of the National Alumni Council, who preferably have both development and NAC experience. The committee convenes twice yearly, during Homecoming and the Alumni Leadership Forum, for in-depth discussion with Development Office staff on development issues and strategies, and actively encourages members of the NAC and its committees to contribute to the College. The Development Committee will serve as a liaison between the NAC and the development office as a whole, the Barnes Society, the Athletic Fundraising office, and other campaign committees as they are created. Membership is composed of:

- Chair/co-Chairs who will serve on the Campaign Planning Committee;
- One other NAC representative, regardless of prior development experience;
- Annual Fund Chair(s) (selected by the College Board of Trustees Development Committee).

Members normally serve 2-year terms, and are appointed by the president of the NAC in consultation with the Director of Development, Director of Alumni Relations and the committee's chair.

The committee chair reports twice yearly to the NAC on committee activities and goals. The Director of Development is an ex-officio member of the committee.

NAC ALUMNI VOLUNTEER FORUM COMMITTEE

The Alumni Volunteer Committee plans the annual Leadership Forum. Serving on the committee are appropriate representatives of the Career office, Admission office, Development office and Alumni Relations office. Also serving are student representatives of the Student/Alumni Association (S/AA). Alumni members of the committee are appointed by the President of the NAC in consultation with the Director of Alumni Relations. The chair of the committee is an ex- officio member of the NAC.

NAC METRO AREA COMMITTEE

The Metro Area Committee, along with the Office of Alumni Relations and NAC leadership, is responsible for metro area program development and management. The Committee strives to educate, convince, persuade and guide the leadership of each metro area to organize its group to its best potential, helping it to relate local program efforts with Alumni Association goals.

The Committee is appointed by the President of the NAC in consultation with the Assistant Director of Alumni Relations and the committee chair.

The committee chair is an ex-officio member of the NAC.

Continues

COLORADO COLLEGE NATIONAL ALUMNI COUNCIL

NAC NOMINATIONS/AWARDS COMMITTEE

The Nominations/Awards Committee has the responsibility of:

- Nominating candidates for NAC membership in odd numbered years, to be elected by the NAC in the spring of that year.
- Providing candidate recommendations to the NAC for election as Alumni trustee.
- Annually proposing recipients of Benezet, Worner and Riley awards to the NAC for its approval.
- Recommending candidates for Alumni Honorary Degrees to the faculty Honorary Degree Committee for its consideration.

The Chair/co-Chair and a majority of the members of the committee must be members of the NAC. Members are appointed by the President and Executive Committee of the NAC in consultation with the Director of Alumni Relations. No member of the committee may be nominated for any position for which the committee has responsibility.

The committee works directly with the Alumni staff which will provide research information for the committee's consideration.

Continues

OTHER ALUMNI COMMITTEEES

REUNION PLANNING COMMITTEES

The Reunion Planning Committees organize and plan special events for their classes during Homecoming weekend. The committee is comprised of local and national members in order to provide a wide range of ideas. The local members generally work closest with the Alumni Relations liaison after the Alumni Leadership Forum to finish final details for the reunion. In addition, Reunion Planning committees are asked to call classmates and urge them to attend Homecoming.

ANNUAL FUND COMMITTEE

The Annual Fund Committee is headed by the Annual Fund Chair. Its members include the immediate past Annual Fund Chair, the National Alumni Council Development Committee Chair, Association of Families Co-Chairs, Block Era President's Council Committee Chairs, Class Agent and Reunion Giving representative, Senior Class Agent Chair(s) and Student Development Committee Chair(s). Other selected individuals are welcome to assist the committee in its mission.

- The committee provides feedback/input on Annual Fund programs, marketing strategies and goals, and helps in the solicitation of gifts for the Annual Fund.
- It provides leadership for the Annual Fund fundraising program.
- It helps to educate alumni, parents, staff and friends about the need for annual support.
- It helps the Annual Fund team and Development staff achieve the $1.7 million Annual Fund goal.

REUNION GIVING COMMITTEES

The Reunion Giving Leadership Committee is comprised of volunteers who contact their classmates for financial support of Colorado College in honor of their milestone reunion. The committee members take the lead in making gifts, thereby setting the pace for the classmates who they will approach for gifts. Their efforts are focused on major gifts.

G.O.L.D. GROUP

Members of the Colorado College Graduates of the Last Decade (G.O.L.D.) are alumni of ten years or less (1988-1997). A committee of G.O.L.D. members has been formed to achieve the following goals and objectives:

- To provide leadership for recent graduates of Colorado College.
- To represent the needs and interests of recent graduates of Colorado College.
- To establish and maintain strong ties with recent graduates.
- To help educate recent graduates about the need for their financial support and alumni participation.
- To support the College and encourage others to support the College, this year, and every year.

Continues

SAMPLE BYLAWS

COLORADO COLLEGE NATIONAL ALUMNI COUNCIL

NAC ALUMNI FORUM COMMITTEE

The Alumni Volunteer Committee plans the annual Leadership Forum. Serving on the committee are appropriate representatives of the Career office, Admission office, Development office and Alumni Relations office. Also serving are student representatives of the Student/Alumni Association (S/AA). Alumni members of the committee are appointed by the President of the NAC in consultation with the Director of Alumni Relations. The chair of the committee is an ex- officio member of the NAC.

CURRENT NAC ALUMNI FORUM COMMITTEE

Chairs: Ron Rubin '73
Jim Burness '90
Larue Marvin '80
Jolina Ward Borah '81
Colleen Currie '92
Brad Friedman '82
Chris Jones '83
Greg Smith '69
Staff
Diane Benninghoff '68
Joy Fritz
Carol Peterson
Rick Roberts
Elizabeth Power Robison
Roger Sheffield

SAMPLE CONSTITUTION

OBERLIN COLLEGE ALUMNI ASSOCIATION

CONSTITUTION
OF THE ALUMNI ASSOCIATION OF OBERLIN COLLEGE

Article I -- Purpose; Organization

To foster the interests and continuing excellence of Oberlin College and to foster communication between the College and its alumni and among alumni, the graduates and former students of Oberlin College associate themselves together in the Alumni Association of Oberlin College. The Association is a not-for-profit membership organization established pursuant to the laws of the State of Ohio. The Association shall conduct its activities so as to maintain its status as a not-for-profit organization under state and federal law.

Article II -- Membership

Section 1 -- Eligibility

Each person who has been graduated from or who has attended the College of Arts and Sciences of Oberlin College, the Oberlin Conservatory of Music, the Oberlin College Graduate School of Theology, or the Kindergarten Primary Training School is entitled to participate as a member of the Association. In addition, each person upon whom the College has conferred an honorary degree or who is designated as an honorary member by the Alumni Council is entitled to participate as an honorary member of the Association.

Section 2 -- Attributes of Membership

Each member is entitled to: (a) participate in each annual and any special meeting of the Association; (b) nominate, vote for, and serve as any officer of the member's class; (c) nominate, vote for, and serve as any officer of any local or regional alumni organization; (d) serve as a member of the Alumni Council and as an officer of the Association, except that no employee of the College may serve as a voting member of the Council or as an Association officer; and (e) suggest and vote on any proposed amendment to this Constitution.

Article III -- Association Meetings; Annual Report

Section 1 -- Meetings

The President of the Association shall convene an annual meeting of the Association. The President of the Association may call and, at the request of the Alumni Council or any 100 members of the Association, shall call a special meeting of the Association.

Section 2 -- Notice of Meetings

Notice of the date, time, place, and purpose of any meeting of the Association must be mailed to all members whose addresses are known or must be published in the *Oberlin Alumni Magazine*, which must be mailed to all members whose addresses are known, in either case, not fewer than 10 days prior to the date of the meeting.

Continues

SAMPLE CONSTITUTION

OBERLIN COLLEGE ALUMNI ASSOCIATION

Section 3 -- Quorum; Voting

Two hundred members attending in person constitute a quorum at each annual and any special meeting of the Association. Except as provided in Article VIII regarding amendments to this Constitution, the members of the Association at any meeting may take any action consistent with this Constitution, the Bylaws of the Association, and applicable law on the affirmative vote of a majority of the members present and voting.

Section 4 -- Annual Report

The President of the Association shall report to the membership at least once each year on the activities of the Association and of the Alumni Council. The report may be presented at the annual meeting of the Association or published in the *Oberlin Alumni Magazine*.

Article IV -- Class Organization

The members of the Association are organized into classes. Pursuant to the Bylaws of the Association and under the supervision of the Alumni Council, each class shall select a President of the class and any other class officers that the class deems appropriate. Class reunions are held at the College according to the schedule set by the Alumni Council in consultation with the Executive Director of the Association and the appropriate College administrators.

Article V -- Local and Regional Organizations

Pursuant to the Bylaws of the Association and under the supervision of the Alumni Council, any group of members of the Association may form a local or regional alumni organization. Each member of the Association who resides within the geographic area served by a local or regional alumni organization shall be entitled to participate in the organization's activities, and to nominate and vote for the officers and to serve as an officer of the organization. Each local or regional alumni organization may designate a representative to serve as a member of the Alumni Council.

Article VI -- Alumni Council

Section 1 -- Composition

(a) An Alumni Council is established to further the purposes of the Association between the College and its alumni and among alumni. The Council is composed of the following representatives of the membership, each of whom shall be a member of the Association and shall be entitled to vote on matters properly before the Council:

  (i) the President or a designee of each class;

  (ii) a fund raising agent from each class;

Continues

SAMPLE CONSTITUTION

OBERLIN COLLEGE ALUMNI ASSOCIATION

- (iii) the representative of each recognized local or regional alumni organization;
- (iv) the six alumni-elected members of the Board of Trustees of Oberlin College;
- (v) the officers of the Association; and
- (vi) any other members as may be provided for in the Bylaws of the Association.

(b) The membership of the Alumni Council also includes as non-voting members:

- (i) the Executive Director and other executive staff of the Association; and
- (ii) any other members as may be provided for in the Bylaws of the Association.

Section 2 -- Powers

The Alumni Council is the governing body of the Association and is empowered to undertake and regulate any action of or on behalf of the Association. It shall have all of the powers necessary and incidental, consistent with this Constitution and applicable law, to carry out its activities and those of the Association. Among its responsibilities, the Council shall adopt and may change, consistent with this Constitution, the Bylaws of the Association. It also shall select the officers of the Association, the members of the Executive Board, and the candidates for alumni-elected members of the Board of Trustees of the College, and may provide its advice and consent on matters presented to it by the Executive Board.

Section 3 -- Council Meetings

The Alumni Council shall meet at least once each year. The President of the Association may call and, at the request of that number of members of the Council as provided in the Bylaws of the Association, shall call one or more additional meetings of the Council. Notice of the date, time, place, and agenda of each meeting must be mailed to each member of the Council at that member's last known address not fewer than 10 days prior to the date of the meeting. A quorum at any meeting of the Council is that number of voting members of the Council attending in person as provided in the Bylaws. The members of the Council at any meeting may take any appropriate action on the affirmative vote of a majority of the voting members who are present and voting.

Section 4 -- Executive Board

(a) An Executive Board of the Alumni Council is established to administer the activities of the Association. Between meetings of the Council, the Board is empowered to act with the same authority as the Council. The Board shall report promptly to the Council on any action taken by the Board. Among its responsibilities, the Board shall establish an annual budget for the Association. In consultation with the appropriate administrative officers of the College and

Continues

with the advice and consent of the Council, the Board shall employ an Executive Director of the Association and may employ any other executive staff that it deems appropriate, establishing the responsibilities of the Executive Director and any other executive staff. The Board also shall appoint from among the members of the Council the members of the Nominations and Trustee Search Committees.

(b) The Board is composed of the officers of the Association, 6 to 12 members of the Alumni Council elected by the Council, and the Executive Director of the Association, who shall not be entitled to vote.

(c) The President of the Association may call and, at the request of that number of members of the Board as provided in the Bylaws of the Association, shall call a meeting of the Board. Notice of the date, time, place, and agenda of any meeting must be given to each member prior to the meeting. The members of the Board may conduct business in person, by telephone conference call, or through written communication. A quorum at any meeting of the Board conducted in person, by telephone conference call, or through written communication is that number of voting members of the Board as provided in the Bylaws. Any appropriate action at any meeting of the Board may be taken on the affirmative vote of a majority of the voting members present.

Section 5 -- Committees

(a) A Nominations Committee is established to select and present to the Alumni Council for its election at its annual meeting (i) the name of at least one candidate for each officer position that will become vacant prior to the next annual meeting of the Council, and (ii) the name of at least one candidate for each non-officer position on the Executive Board that will become vacant prior to the next annual meeting of the Council. The committee also shall assume any additional responsibilities as determined by the Executive Board.

(b) A Trustee Search Committee is established to select and present to the Alumni Council for its consideration at its annual meeting the names of two or three alumni to be presented to the members of the Association as candidates for the position of alumni-elected member of the Board of Trustees of Oberlin College.

(c) The Executive Board may establish and appoint the members of any other committee or task force as it deems appropriate. The President of the Association or the President's designee shall be an ex-officio member of each committee or task force, except for the Nominations and Trustee Search Committees; and the Executive Director of the Association or the Executive Director's designee shall be a non-voting member of each committee and task force, including the Nominations and Trustee Search Committees.

Articles VII -- Officers

The Association is to have a President and such additional officers, no more than three in number, as may be provided in the Bylaws of the Association. Consistent with this Constitution, the qualifications, titles, duties, and terms of office of the officers are as

Continues

provided in the Bylaws.

Article VIII -- Amendments

Section 1 -- Proposals

A proposal to amend this Constitution may be initiated by the Alumni Council or by a written petition of at least 100 members of the Association. If a proposal is initiated by petition of the members, (a) the petition must state whether the proposed amendment is to be presented to the members for a vote at the next annual meeting of the Association, at a special meeting, or through a ballot published in the *Oberlin Alumni Magazine*; and (b) the Alumni Council or the Executive Board shall consider the proposal and present its recommendation, along with the proposal, to the members in accordance with the petition.

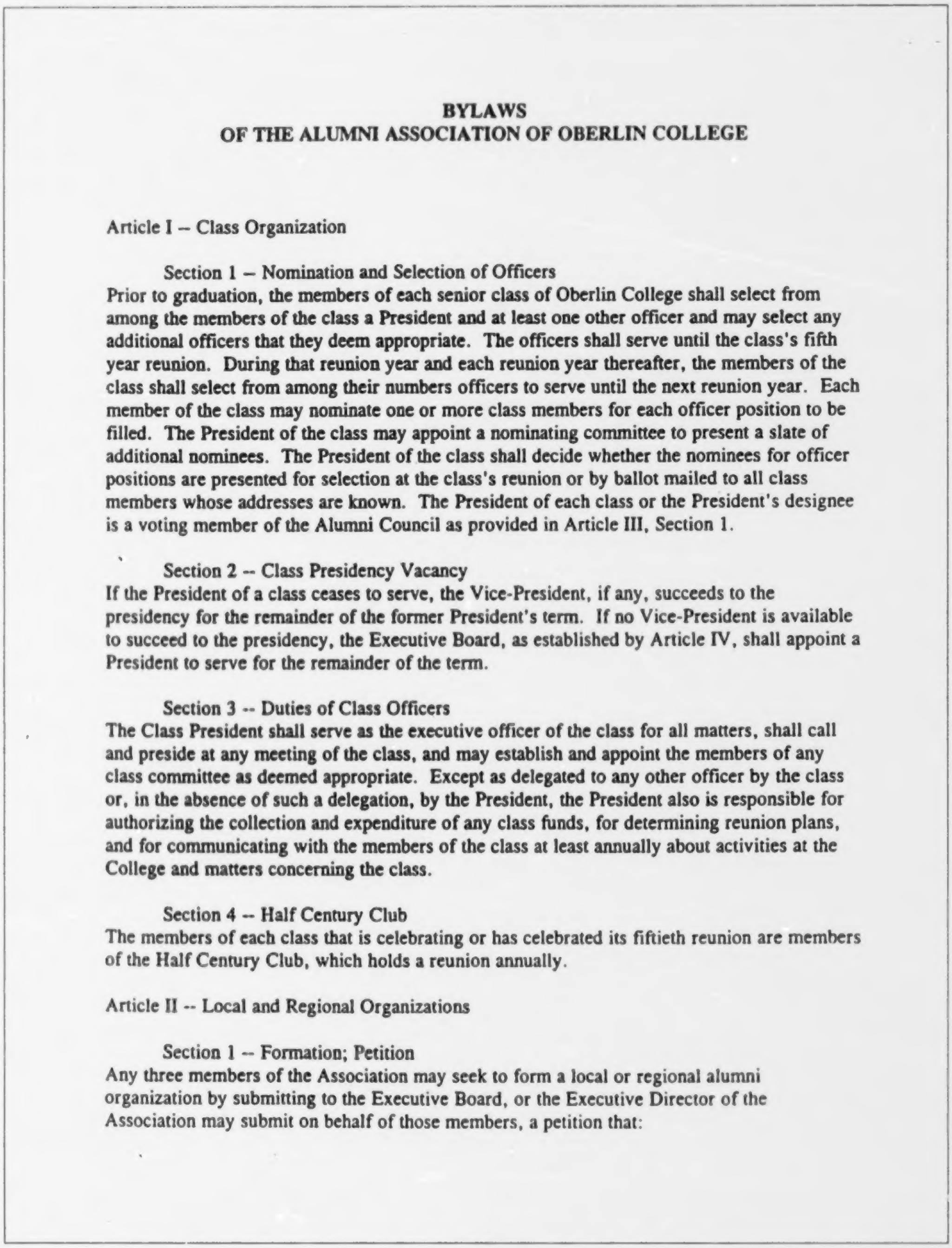
Section 2 -- Voting; Notice

This Constitution may be amended by the affirmative vote of three-fifths of the members voting on the amendment at any annual or special meeting of the Association at which a quorum is present or through a ballot published in the *Oberlin Alumni Magazine* or mailed to all members whose addresses are known. If the proposed amendment is to be voted on at a meeting of the Association, notice of the proposed amendment must be provided either by publication in the Magazine or by mail, which issue of the Magazine or other notice must be mailed to all members whose addresses are known not fewer than 10 days prior to the meeting at which the proposed amendment is to be voted on.

Approved 1984
Alumni Association

SAMPLE BYLAWS

OBERLIN COLLEGE ALUMNI ASSOCIATION



BYLAWS
OF THE ALUMNI ASSOCIATION OF OBERLIN COLLEGE

Article I -- Class Organization

Section 1 -- Nomination and Selection of Officers

Prior to graduation, the members of each senior class of Oberlin College shall select from among the members of the class a President and at least one other officer and may select any additional officers that they deem appropriate. The officers shall serve until the class's fifth year reunion. During that reunion year and each reunion year thereafter, the members of the class shall select from among their numbers officers to serve until the next reunion year. Each member of the class may nominate one or more class members for each officer position to be filled. The President of the class may appoint a nominating committee to present a slate of additional nominees. The President of the class shall decide whether the nominees for officer positions are presented for selection at the class's reunion or by ballot mailed to all class members whose addresses are known. The President of each class or the President's designee is a voting member of the Alumni Council as provided in Article III, Section 1.

Section 2 -- Class Presidency Vacancy

If the President of a class ceases to serve, the Vice-President, if any, succeeds to the presidency for the remainder of the former President's term. If no Vice-President is available to succeed to the presidency, the Executive Board, as established by Article IV, shall appoint a President to serve for the remainder of the term.

Section 3 -- Duties of Class Officers

The Class President shall serve as the executive officer of the class for all matters, shall call and preside at any meeting of the class, and may establish and appoint the members of any class committee as deemed appropriate. Except as delegated to any other officer by the class or, in the absence of such a delegation, by the President, the President also is responsible for authorizing the collection and expenditure of any class funds, for determining reunion plans, and for communicating with the members of the class at least annually about activities at the College and matters concerning the class.

Section 4 -- Half Century Club

The members of each class that is celebrating or has celebrated its fiftieth reunion are members of the Half Century Club, which holds a reunion annually.

Article II -- Local and Regional Organizations

Section 1 -- Formation; Petition

Any three members of the Association may seek to form a local or regional alumni organization by submitting to the Executive Board, or the Executive Director of the Association may submit on behalf of those members, a petition that:

Continues

SAMPLE BYLAWS

OBERLIN COLLEGE ALUMNI ASSOCIATION

(a) states the proposed name of the organization, the proposed geographic area to be served, and the purposes for which the organization is to be formed;

(b) lists the names of at least three initial organizers;

(c) designates any initial representatives to serve on the Alumni Council; and

(d) provides that the members of the proposed organization agree to abide by the Constitution and Bylaws of the Association. If the Executive Board acts favorably on the petition, the organization may begin to function as an official body of the Association, and the organization's initial representative becomes a member of the Alumni Council.

Section 2 – Membership

Each member of the Association who resides within the geographic area served by a local or regional alumni organization shall be entitled to participate in the organization's activities and to nominate, and vote for, and serve as any officer of the organization.

Section 3 -- Bylaws

Each local or regional alumni organization may adopt bylaws, policies, and procedures for the governance of its activities, provided that those bylaws, policies, and procedures are consistent with the Constitution and Bylaws of the Association.

Section 4 – Withdrawal of Recognition

If the Executive Board determines that a local or regional alumni organization is not abiding by the Constitution or Bylaws of the Association or otherwise is not serving the best interests of the Association, as it deems appropriate, it may change the organization's bylaws, policies, or procedures, remove any officer or leader of the organization, appoint a substitute officer or leader of the organization, or withdraw the Association's recognition of the organization.

Article III – Alumni Council

Section 1 – Voting Members

The Alumni Council is composed of the following representatives of the membership of the Association, each of whom shall be entitled to vote as a member of the Council:

(a) the President of each class or a designee;

(b) a fund-raising agent for each class designated by the Development Office of the College in consultation with the Class President;

(c) the representative of each local or regional alumni organization;

(d) the six alumni-elected members of the Board of Trustees of the College;

Continues

SAMPLE BYLAWS

OBERLIN COLLEGE ALUMNI ASSOCIATION

(e) the three officers of the Association;

(f) each regional coordinator of the Alumni Admissions Representative Program designated by the Office of Admissions of the College;

(g) each regional coordinator of the alumni career counseling network or summer jobs coordinator designated by the Office of Career Development and Placement of the College; and

(h) those additional at-large members selected by the Executive Board, giving due regard to a fair representation of the membership of the Association.

Section 2 -- Non-Voting Members

The membership of the Council also includes as non-voting members:

(a) the Executive Director and any other executive staff of the Association;

(b) the Vice-President for Development and Alumni Affairs of the College or a designee; and

(c) a student representative from each of the sophomore, junior, and senior classes designated by the Executive Director of the Association.

Section 3 -- Call of Meetings; Quorum

The President of the Association shall call a meeting of the Council at least once each year and may call and, at the request of 50 voting members of the Council, shall call a special meeting of the Council. Fifty voting members attending in person constitute a quorum at any Council meeting.

Section 4 -- Terms of Service

The at-large members of the Council as provided in Section 1(h) of this Article each shall serve three-year terms, beginning with the first regular, annual meeting of the Council and continuing through the conclusion of the third regular, annual Council meeting following their appointment. The remaining Council members shall serve while holding the office or handling the responsibilities by virtue of which they become members of the Council.

Section 5 -- Committees

(a) An Awards Committee is established to determine what awards are to be given on behalf of the Association and to recommend to the Alumni Council for its consideration at its annual meeting the names of proposed recipients for those awards that the committee has determined to bestow for distinguished service to the College or the Association. The Executive Board shall appoint the members of the Awards Committee from among the members of the Council.

Continues

(b) A Magazine Committee is established to evaluate, review, and make recommendations to the editor about the format and content of the Alumni Magazine. The Executive Board shall appoint the members of the Magazine Committee, who each shall serve for a three-year term as designated by the Board.

(c) No member of a committee may serve more than six consecutive years on that committee.

Article IV -- Executive Board

Section 1 -- Membership; Terms of Service

The Executive Board is composed of the three officers of the Association, the Chair of the Trustee Search Committee and, five to eleven other members of the Alumni Council all elected by the Council, giving due regard to a fair representation of the membership of the Council, and the Executive Director of the Association, who shall not be entitled to vote. The Association officers shall serve as Board members during their terms of office. The other voting members of the Board shall be divided into three classes, with the members in each class serving staggered, three-year terms, beginning with the first regular, annual meeting of the Council and continuing through the conclusion of the third regular, annual Council meeting following their appointment. No member of the Board may serve more than six consecutive years on the Board.

Section 2 -- Meetings; Quorum

The Executive Board shall meet at least twice each year. The President may call and, at the request of three-fifths of the voting members of the Board, shall call a special meeting of the Board. At the President's discretion, the members of the Board may meet and conduct business in person, by telephone conference call, or through written communication. Three-fifths of the voting members of the Board appearing in person, participating in a telephone conference call, or acting by means of written communication constitutes a quorum of the Board for the conduct of business.

Article V -- Officers of the Association

Section 1 -- Officers

There are three officers of the Association: the President, the Past-President or President-Elect (as provided in Section 3 of this Article on terms of office), and the Treasurer.

Section 2 -- Eligibility

Any current or former voting member of the Alumni Council who is not, at the time of the election or while serving as an officer, an employee of the College is eligible to serve as an officer of the Association. The President may not serve more than one and the Treasurer not more than two consecutive terms in their respective offices.

Continues

SAMPLE BYLAWS

OBERLIN COLLEGE ALUMNI ASSOCIATION

Section 3 -- Terms of Office

The President and the Treasurer shall assume their respective offices at the conclusion of the Alumni Council meeting at which they are elected and shall serve through the conclusion of the second regular, annual Council meeting following their election. During the first year of the President's term, the immediate former President shall serve as Past-President. At the annual meeting of the Alumni Council at the end of the President's first year in office, the Council shall elect a President-Elect, who shall serve in that capacity during the President's second year in office. At the end of the President's term in office, the President-Elect shall succeed to the presidency.

Section 4 -- Duties of Officers

(a) The President is the executive officer of the Association and shall call and preside at each meeting of the Alumni Association, Alumni Council, and Executive Board. The President is an ex-officio member of each committee of the Association, except for the Nominations and Trustee Search Committees. Among the President's most important responsibilities is maintaining communication with the College through regular contacts with the President of the College and the Board of Trustees.

(b) The Past-President or President-Elect shall serve as the executive officer of the Association in the absence of the President, and shall perform any other duties delegated by the President.

(c) The Treasurer is the chief financial officer of the Association and is responsible for the Association budget. The Treasurer shall call and preside at each meeting of the Association, Council, or Board in the absence of the other two officers. In addition, the Treasurer shall perform any other duties delegated by the President.

Article VI -- Association Budget

The Association's fiscal year is the same as that of the College. For each fiscal year, the Executive Board shall submit to the College a proposed budget for the operations of the Association. If for any reason the College ceases to fund the operations of the Association, the Executive Board shall assume responsibility and establish methods for funding those operations.

Article VII -- Procedural Rules

Procedural matters affecting the Association, the classes, the local and regional alumni organizations, the Alumni Council, the Executive Board, and the committees of the Board are governed by the current edition of Robert's Rules of Order Newly Revised, to the extent that those rules are applicable and are not inconsistent with the Constitution and Bylaws of the Association.

Continues

SAMPLE BYLAWS

OBERLIN COLLEGE ALUMNI ASSOCIATION

Article VIII -- Amendments

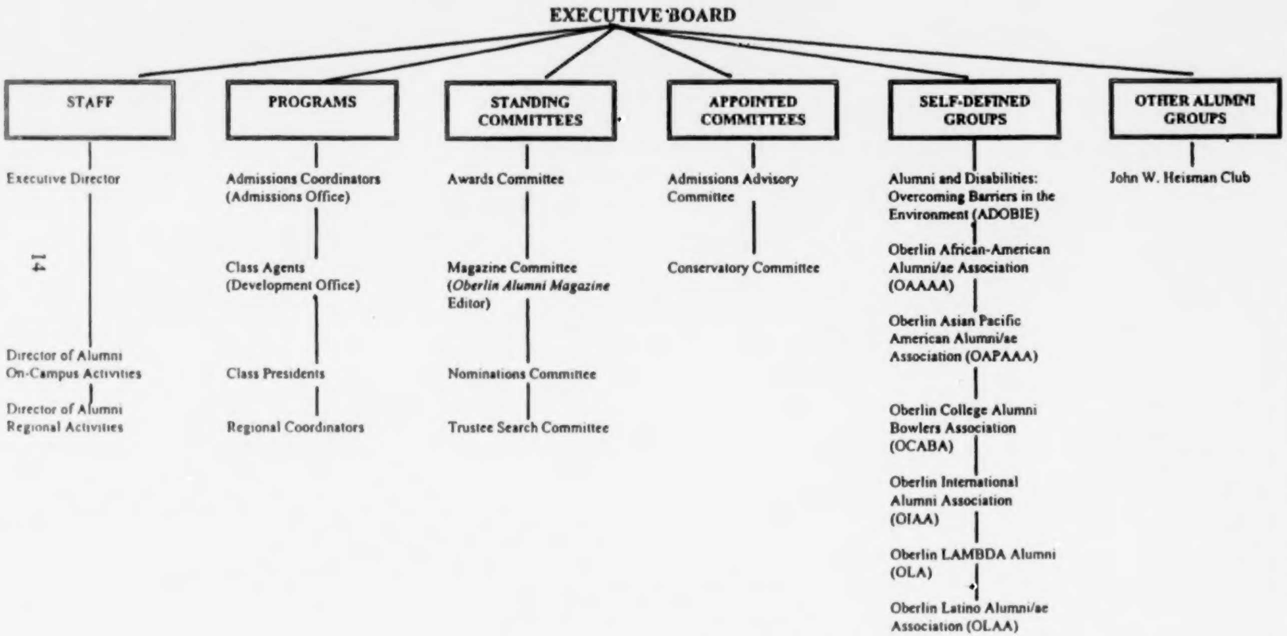
These Bylaws may be amended by the affirmative vote of three-fifths of the voting members of the Alumni Council who vote on the proposed amendment at any annual or special meeting of the Council or by ballot mailed to each voting member of the Council.

Approved
Alumni Association
Amended 9/22/96
Alumni Council Meeting

Continues

SAMPLE ORGANIZATIONAL CHART
OBERLIN COLLEGE ALUMNI ASSOCIATION

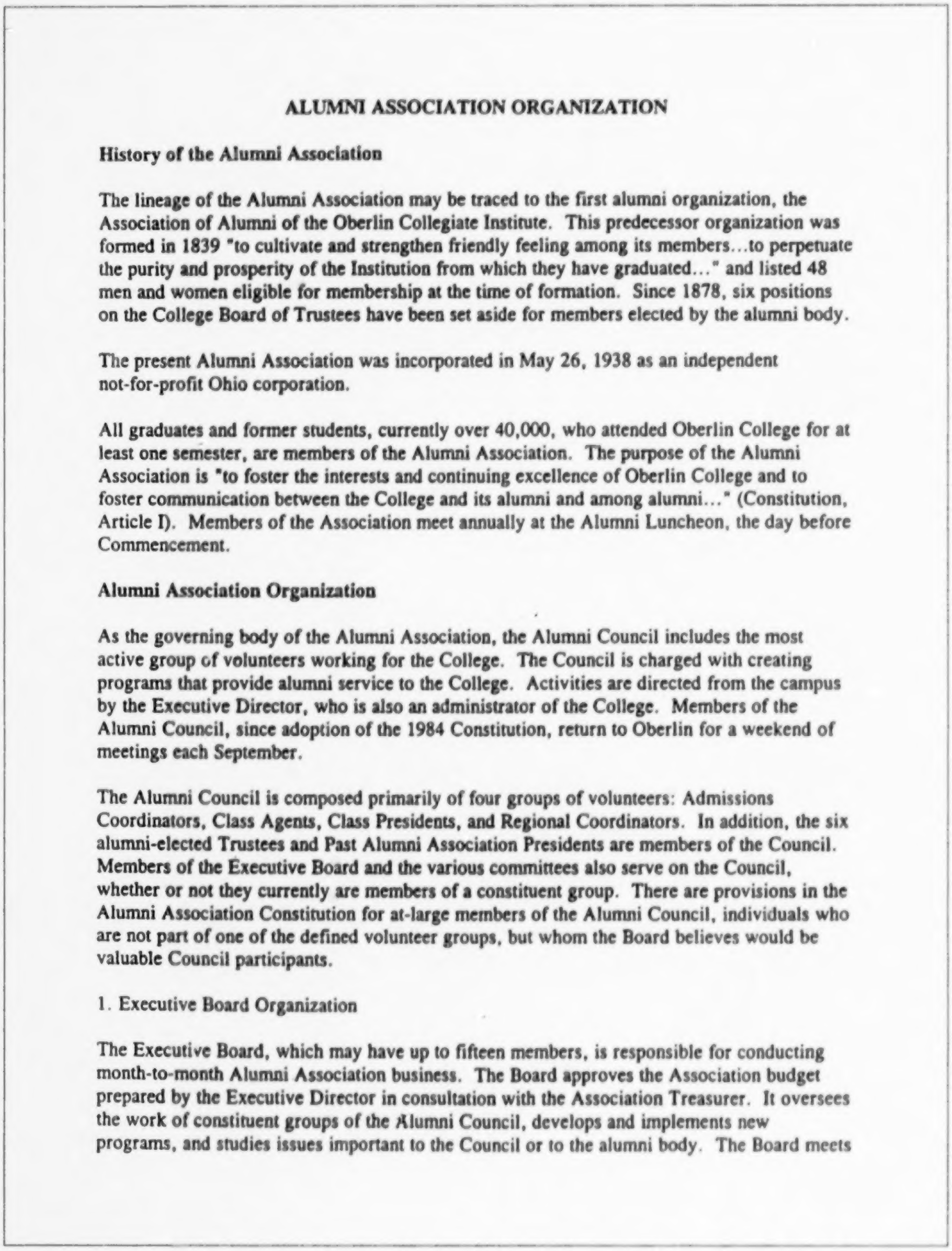
ALUMNI ASSOCIATION ORGANIZATIONAL CHART
ALUMNI COUNCIL


EXECUTIVE BOARD
STAFF
Executive Director
Director of Alumni On-Campus Activities
Director of Alumni Regional Activities
14
PROGRAMS
Admissions Coordinators (Admissions Office)
Class Agents (Development Office)
Class Presidents
Regional Coordinators
STANDING COMMITTEES
Awards Committee
Magazine Committee (*Oberlin Alumni Magazine* Editor)
Nominations Committee
Trustee Search Committee
APPOINTED COMMITTEES
Admissions Advisory Committee
Conservatory Committee
SELF-DEFINED GROUPS
Alumni and Disabilities: Overcoming Barriers in the Environment (ADOBIE)
Oberlin African-American Alumni/ae Association (OAAAA)
Oberlin Asian Pacific American Alumni/ae Association (OAPAAA)
Oberlin College Alumni Bowlers Association (OCABA)
Oberlin International Alumni Association (OIAA)
Oberlin LAMBDA Alumni (OLA)
Oberlin Latino Alumni/ae Association (OLAA)
OTHER ALUMNI GROUPS
John W. Heisman Club

BEST COPY AVAILABLE

SAMPLE ASSOCIATION ORGANIZATION

OBERLIN COLLEGE ALUMNI ASSOCIATION



ALUMNI ASSOCIATION ORGANIZATION

History of the Alumni Association

The lineage of the Alumni Association may be traced to the first alumni organization, the Association of Alumni of the Oberlin Collegiate Institute. This predecessor organization was formed in 1839 "to cultivate and strengthen friendly feeling among its members...to perpetuate the purity and prosperity of the Institution from which they have graduated..." and listed 48 men and women eligible for membership at the time of formation. Since 1878, six positions on the College Board of Trustees have been set aside for members elected by the alumni body.

The present Alumni Association was incorporated in May 26, 1938 as an independent not-for-profit Ohio corporation.

All graduates and former students, currently over 40,000, who attended Oberlin College for at least one semester, are members of the Alumni Association. The purpose of the Alumni Association is "to foster the interests and continuing excellence of Oberlin College and to foster communication between the College and its alumni and among alumni..." (Constitution, Article I). Members of the Association meet annually at the Alumni Luncheon, the day before Commencement.

Alumni Association Organization

As the governing body of the Alumni Association, the Alumni Council includes the most active group of volunteers working for the College. The Council is charged with creating programs that provide alumni service to the College. Activities are directed from the campus by the Executive Director, who is also an administrator of the College. Members of the Alumni Council, since adoption of the 1984 Constitution, return to Oberlin for a weekend of meetings each September.

The Alumni Council is composed primarily of four groups of volunteers: Admissions Coordinators, Class Agents, Class Presidents, and Regional Coordinators. In addition, the six alumni-elected Trustees and Past Alumni Association Presidents are members of the Council. Members of the Executive Board and the various committees also serve on the Council, whether or not they currently are members of a constituent group. There are provisions in the Alumni Association Constitution for at-large members of the Alumni Council, individuals who are not part of one of the defined volunteer groups, but whom the Board believes would be valuable Council participants.

1. Executive Board Organization

The Executive Board, which may have up to fifteen members, is responsible for conducting month-to-month Alumni Association business. The Board approves the Association budget prepared by the Executive Director in consultation with the Association Treasurer. It oversees the work of constituent groups of the Alumni Council, develops and implements new programs, and studies issues important to the Council or to the alumni body. The Board meets

Continues

OBERLIN COLLEGE ALUMNI ASSOCIATION

four times a year; usually in March, June, September, and November. No member of the Board may serve more than six consecutive years.

As stated in the Bylaws of the Association (Article IV), the Board is composed of three elected officers, the President, the Treasurer, and either the President-Elect or the Past-President, the Trustee Search Committee Chair, and five to eleven at-large members.

Each President is elected to a one-year term as President-Elect followed by two years as President and one more year as Past-President. This means that the third officer of the Association during the first year of a President's term is the Past-President, while during the second year it is the President-Elect. This four-year term of service cannot be repeated consecutively. The Treasurer may serve up to two consecutive two-year terms. The five to eleven at-large Board members may serve two terms of three years.

2. Executive Board Committees

There are four standing committees answerable to and appointed by the Executive Board. These are the Awards, Magazine, Nominations, and Trustee Search Committees. In addition, the Board has appointed the Admissions Advisory and Conservatory Committees. For all groups except the Conservatory and Magazine Committees, current membership on the Alumni Council is usually required for appointment to a committee. Committee chairs are usually members of the Executive Board. The Executive Director of the Alumni Association or designee is an ex-officio member of all committees.

The Admissions Advisory Committee provides guidance and support to the Admissions Office with regard to the admissions process and facilitates the relationship between the Admissions Office and the Alumni Association. Members are selected from the Alumni Council and serve three-year staggered terms. The committee usually meets during Alumni Council weekend and one other weekend in the spring.

The Awards Committee recommends to the Executive Board the recipients of the Alumni Medal, Distinguished Service, Certificate of Appreciation, Volunteers of the Year awards, and any other awards approved by the Alumni Association. Members are selected from the Alumni Council and serve three-year staggered terms. The committee usually meets during Alumni Council weekend.

The Conservatory Committee, composed of Conservatory alumni, supports the educational mission of the Conservatory of Music and enhances the relationship of the Conservatory with its alumni. Members serve three-year staggered terms and serve as members of the Alumni Council for the duration of their committee terms. The committee usually meets during Alumni Council weekend.

The Magazine Committee evaluates, reviews, and makes recommendations to the editor of the *Oberlin Alumni Magazine* about the format and content of the Magazine. Members are

Continues

SAMPLE ASSOCIATION ORGANIZATION

OBERLIN COLLEGE ALUMNI ASSOCIATION

chosen by virtue of their expertise in journalism and publishing. Members serve three-year staggered terms and serve as members of the Alumni Council for the duration of their committee terms. The committee usually meets during Alumni Council weekend and one other weekend in the spring.

The Nominations Committee prepares slates of nominees to fill vacancies on committees and candidates to stand for election to the Executive Board. It also assumes any additional responsibilities as determined by the Executive Board. Members are selected from the Alumni Council and serve three-year staggered terms. The committee usually meets during Alumni Council weekend and one other weekend in the spring.

The Trustee Search Committee identifies alumni to stand for a graduate-wide election conducted each fall to choose an alumni-elected trustee who will serve a six-year term on the Board of Trustees. Members are selected from the Alumni Council and serve three-year staggered terms. The committee usually meets during Alumni Council weekend and one other weekend in December.

3. Self-Defined Affiliate Groups

The **Oberlin LAMBDA** (OLA) was approved by the Executive Board in fall 1989 as the Alumni Association's first self-defined group. It serves to facilitate the relationship between the College and its lesbian, gay, and bisexual alumni, and to increase the visibility of lesbian, gay, and bisexual persons and concerns in the life of the College. Steering group members serve three-year terms and usually meet during Alumni Council weekend and one other weekend in the spring. One of the co-chairs serves on the Alumni Council.

The **Oberlin College Alumni Bowlers Association** (OCABA) was approved by the Executive Board in fall 1991 as the Alumni Association's second self-defined group. It is composed of alumni who bowled in Wilder or Hales while at Oberlin, and serves to encourage and support promotion of bowling on campus and with alumni. The bowlers coordinate an alumni bowling "Fun-Raiser" event during Commencement/Reunion weekend and send an annual newsletter to alumni. One of the co-chairs serves on the Alumni Council.

Alumni and Disabilities: Overcoming Barriers in the Environment (ADOBIE) was approved by the Executive Board in fall 1991 as the Alumni Association's third self-defined group. It serves to provide a means of regular contact among Oberlin alumni with disabilities for the purpose of educating one another about issues of common concern both at the College and at the national level, working as mentors/advocates for current Oberlin students with disabilities, and working with and providing technical information for the Oberlin administration in order to make the educational environment more accessible to students, alumni, faculty, staff, and community members with disabilities. One of the co-chairs serves on the Alumni Council.

Continues

SAMPLE ASSOCIATION ORGANIZATION

OBERLIN COLLEGE ALUMNI ASSOCIATION

The **Oberlin Asian Pacific American Alumni/ae Association** (OAPAAA) was approved by the Executive Board in spring 1992 as the Alumni Association's fourth self-defined group. It serves to foster communication and community on all issues of interest among APA alumni/ae and students, and to provide representation of APA alumni/ae and voice for APA issues and concerns in the Alumni Council and in Oberlin College as a whole. One of the co-chairs serves on the Alumni Council.

The **Oberlin Latino Alumni/ae Association** (OLAA) was approved by the Executive Board in spring 1993 as the Alumni Association's fifth self-defined group. It serves to foster communication and community on all issues of interest among Latino alumni/ae and students, to provide representation of Latino alumni/ae and voice for Latino issues and concerns in the Alumni Council and in Oberlin College as a whole, and to increase and retain the number of Latinos in the Oberlin College community as students, faculty, and staff. One of the co-chairs serves on the Alumni Council.

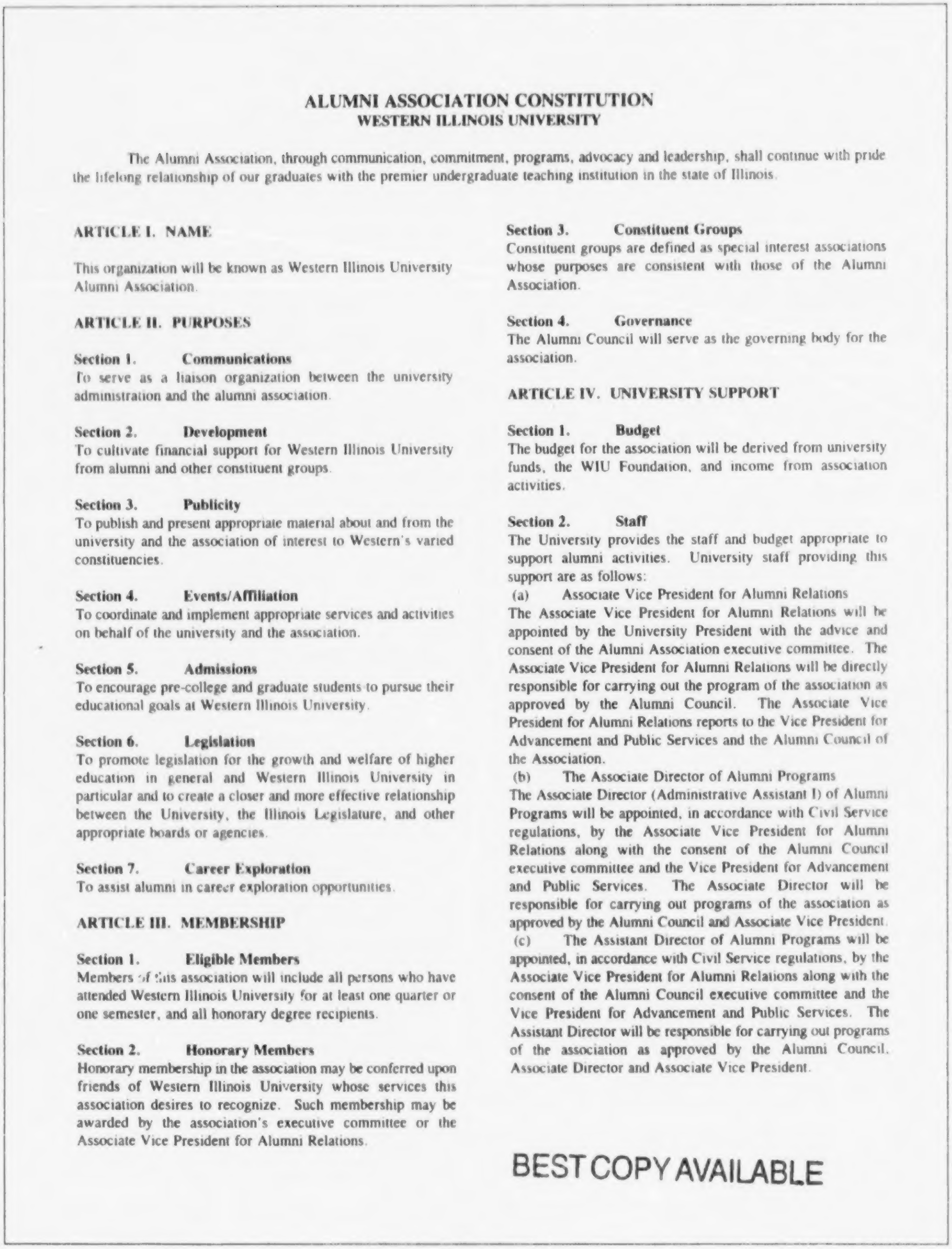
The **Oberlin International Alumni Association** (OIAA) was approved by the Executive Board in fall 1995 as the Alumni Association's sixth self-defined group. It serves to compile up-to-date information about the current status of international alumni through a comprehensive data base; create an on-going sense of being a part of the Oberlin community by providing a means of regular contact among international alumni in their respective regions; provide a way for international alumni to offer their continual support, expertise, commitment, and recognition of the college through country and regional meetings; encourage their participation in local and national alumni events in the United States; become a resource for the college in the areas of recruitment, development, fund-raising, academic and business contacts, and travel; offer support, advice and contacts for currently enrolled students and graduates who seek international contacts and who are traveling or working abroad. One of the co-chairs serves on the Alumni Council.

The **Oberlin African-American Alumni Association** (OAAAA) was approved by the Executive Board in fall 1997 as the Alumni Association's seventh self-defined group. It serves to facilitate the relationship between the College and its African-American alumni and to increase the visibility of African-American persons and concerns in the life of the College. Steering group members serve three-year terms and usually meet during Alumni Council weekend and one other weekend in the spring. One of the co-chairs serves on the Alumni Council.

4. Other Alumni Groups

The **John W. Heisman Club** was established in 1979 and named after Oberlin's first intercollegiate football coach. Its purpose is to: maintain an effective presence with college administration to assure that a complete intercollegiate athletic program is properly funded and supported; raise funds in support of special projects particularly relative to intercollegiate athletics; identify high school student athletes and encourage their enrollment; honor present and former athletes. A representative serves on the Alumni Council.

SAMPLE ASSOCIATION CONSTITUTION
WESTERN ILLINOIS UNIVERSITY



ALUMNI ASSOCIATION CONSTITUTION
WESTERN ILLINOIS UNIVERSITY

The Alumni Association, through communication, commitment, programs, advocacy and leadership, shall continue with pride the lifelong relationship of our graduates with the premier undergraduate teaching institution in the state of Illinois.

ARTICLE I. NAME

This organization will be known as Western Illinois University Alumni Association.

ARTICLE II. PURPOSES

Section 1. Communications
To serve as a liaison organization between the university administration and the alumni association.

Section 2. Development
To cultivate financial support for Western Illinois University from alumni and other constituent groups.

Section 3. Publicity
To publish and present appropriate material about and from the university and the association of interest to Western's varied constituencies.

Section 4. Events/Affiliation
To coordinate and implement appropriate services and activities on behalf of the university and the association.

Section 5. Admissions
To encourage pre-college and graduate students to pursue their educational goals at Western Illinois University.

Section 6. Legislation
To promote legislation for the growth and welfare of higher education in general and Western Illinois University in particular and to create a closer and more effective relationship between the University, the Illinois Legislature, and other appropriate boards or agencies.

Section 7. Career Exploration
To assist alumni in career exploration opportunities.

ARTICLE III. MEMBERSHIP

Section 1. Eligible Members
Members of this association will include all persons who have attended Western Illinois University for at least one quarter or one semester, and all honorary degree recipients.

Section 2. Honorary Members
Honorary membership in the association may be conferred upon friends of Western Illinois University whose services this association desires to recognize. Such membership may be awarded by the association's executive committee or the Associate Vice President for Alumni Relations.

Section 3. Constituent Groups
Constituent groups are defined as special interest associations whose purposes are consistent with those of the Alumni Association.

Section 4. Governance
The Alumni Council will serve as the governing body for the association.

ARTICLE IV. UNIVERSITY SUPPORT

Section 1. Budget
The budget for the association will be derived from university funds, the WIU Foundation, and income from association activities.

Section 2. Staff
The University provides the staff and budget appropriate to support alumni activities. University staff providing this support are as follows:
(a) Associate Vice President for Alumni Relations
The Associate Vice President for Alumni Relations will be appointed by the University President with the advice and consent of the Alumni Association executive committee. The Associate Vice President for Alumni Relations will be directly responsible for carrying out the program of the association as approved by the Alumni Council. The Associate Vice President for Alumni Relations reports to the Vice President for Advancement and Public Services and the Alumni Council of the Association.
(b) The Associate Director of Alumni Programs
The Associate Director (Administrative Assistant I) of Alumni Programs will be appointed, in accordance with Civil Service regulations, by the Associate Vice President for Alumni Relations along with the consent of the Alumni Council executive committee and the Vice President for Advancement and Public Services. The Associate Director will be responsible for carrying out programs of the association as approved by the Alumni Council and Associate Vice President.
(c) The Assistant Director of Alumni Programs will be appointed, in accordance with Civil Service regulations, by the Associate Vice President for Alumni Relations along with the consent of the Alumni Council executive committee and the Vice President for Advancement and Public Services. The Assistant Director will be responsible for carrying out programs of the association as approved by the Alumni Council, Associate Director and Associate Vice President.

BEST COPY AVAILABLE

Continues

SAMPLE ASSOCIATION CONSTITUTION

WESTERN ILLINOIS UNIVERSITY

(d) Support staff
Support staff will be appointed by the Associate Vice President, Associate Director, and Assistant Director of Alumni Programs in accordance with Civil Service regulations.

Section 3. Publications
Western News, an alumni news publication, shall be regularly distributed to all members of the Alumni Association by the Alumni Association and the Publications office staff. An alumni directory shall also be made available periodically.

ARTICLE V. ALUMNI COUNCIL

Section 1. Membership & Terms
The Alumni Council will be comprised of the elected officers (president, vice-president, and secretary), the immediate past president and 21 representatives appointed by the executive committee. The Associate Vice President for Alumni Programs, the Associate Alumni Director, the Assistant Alumni Director, Vice-President for Advancement and Public Services and the University President are ex-officio members of the council. One member, from among the 21 representatives chosen by the executive committee may be designated as the legislative liaison. That individual must have expertise in dealing with the legislative and governmental process in Springfield. The position of legislative liaison shall not be subject to the 6 year term limitation.

Section 2 Terms
One-third of the membership will be appointed every year to a three-year term. Consecutive service will be limited to two terms.

Section 3. Nominations
The general membership may nominate individuals for positions on the Alumni Council. These nominations will be reviewed and final selection for council membership made by the executive committee*. The member selection process should insure representation of Western's diverse alumni population.

Section 4. Removal
In the event a council member misses three consecutive council meetings, the member will be replaced by a new member appointed by the executive committee. In the event extenuating circumstances have caused the Council member to miss three consecutive meetings and the member desires to remain on the Council, a letter explaining the extenuating circumstances must be sent to the executive committee for its review and decision on the member's status.

Section 5. Vacancies
The executive committee shall appoint new members to fill any vacancies which may occur.

Section 6. Officers
The officers of the association will consist of the president, vice-president, secretary, and the Associate Vice President for Alumni Programs. The Associate Director or Assistant Director of Alumni Programs will serve in the absence of the Associate Vice President. Officers' terms are for two years or until their successors are elected.

Section 7. Executive committee
The president, vice president, the immediate past president, secretary, and the Associate Vice President for Alumni Programs will constitute an executive committee. The Associate or Assistant Director of Alumni Programs will serve in the absence of the Associate Vice President. The executive committee will have the authority to make decisions on behalf of the council when the council is not in session.

Section 8. Meetings
The dates of the meetings will be determined by the Alumni Council. At least one meeting will be held each year. All members of the Alumni Council must be notified at least two weeks in advance of the meetings.
(a) Special meetings of the council may be called at the request of the association president, the Associate Vice President for Alumni Relations, or at the written request of a minimum of six members of the council at any time provided one week's notification is given to all council members.
(b) Location of meetings will be Western Illinois University or locations determined by the council.
(c) Meeting attendance will be open to all alumni.

Section 9. Voting
All members of the Alumni Council who are not ex-officio members may vote.

ARTICLE VI. ELECTION OF OFFICERS

Section 1. Election
The election of the association officers will take place at the regular spring meeting of the Alumni Council.

Section 2. Induction
Officers will be inducted and assume their responsibilities on June 1 following the regular spring meeting at which they are elected.

Section 3. Nominations
Thirty days prior to the regular spring meeting, nominations for the offices of president, vice president and secretary will be submitted to the Associate Vice President for Alumni Relations. The executive committee will present a slate of officers to the Alumni Council prior to the regular spring meeting.

BEST COPY AVAILABLE

Continues

SAMPLE CONSTITUTION

WESTERN ILLINOIS UNIVERSITY ALUMNI ASSOCIATION

ARTICLE VII. COMMITTEES

Section 1. Executive committee
As described in Article IV Section 7 of the constitution.

Section 2. Awards committee
This committee will be appointed by the president on the recommendation of the executive committee and will select alumni award recipients.

Section 3. Other committees
Additional committees may be appointed by the executive committee.

ARTICLE VIII. ALUMNI FUND-RAISING

Section 1. Alumni Association Activities
The Alumni Association will be directly responsible for two fund-raising programs: Western Illinois Now (WIN) and the G. Allan Laflin Alumni Council Scholarship.

(a) WIN monies will be distributed as follows: 1/3 to scholarships; 1/2 to alumni operating; and 1/6 for improvements to the Alumni House.

(b) Laflin monies will be raised through solicitations to current and former members of the Alumni Council. This scholarship will be awarded once per year.

Section 2. Other Activities
All fund-raising activities involving WIU Alumni, parents, and friends, shall be conducted in consultation and coordination with the Executive Director of the WIU Foundation and the Associate Vice President for Alumni Relations.

ARTICLE IX. ADMISSIONS

Section 1. Alumni Support
The Alumni Association will support the Admissions program through activities designed to enhance the image of WIU and to recruit candidates for admission.

Section 2. Other Admissions Activities
All admissions activities involving WIU alumni, parents, and friends shall be conducted in coordination with the WIU Admissions office.

ARTICLE X. RULES OF PROCEDURE

Section 1. Rules of Order
The order of business and rules for conducting meetings will be those set forth in Roberts Rules of Order.

Section 2. Quorum
A quorum will consist of 12 members of the Alumni Council.

Section 3. Majority
Unless otherwise specified, a majority will be considered to mean a simple majority of those in attendance.

ARTICLE XI. AMENDMENTS

Section 1. Amendments
The constitution of the Western Illinois University Alumni Association may be proposed by a member of the Alumni Council and be ammended by a two-thirds favorable vote of those in attendance at the regular or special meetings provided a written copy of the proposed amendment is submitted to the members of the Council one week before action is taken.

26 April 1997

BEST COPY AVAILABLE

APPENDIX IV

CASE ALUMNI PROGRAMMING RESOURCES

Adams, Rick. "Lifestyles of the Young and Driven: Even A Well-Established Association Can Get Behind the Times. Here's How One College Grapples With Today's Alumni." CURRENTS 18, no. 8 (September 1992): 28–32, 34.

Amos, Ralph. "Going the Distance: How to Give Your Special-Interest Groups the Tools for Long-Term Success." CURRENTS 21, no. 3 (March 1995): 8–12.

Bailey, Archie. "Welcome Back: A Volunteer Tells How to Get Minority Alumni Interested, Inspired, and Involved." CURRENTS 21, no. 3 (March 1995): 56.

Barbalich, Andrea, Donna Shoemaker, and April Harris. "Great Show: Experts Share 30 Spicy Ideas for Top-Performing Special Events." CURRENTS 18, no. 7 (July/August 1992): 44–50, 52–53.

Blansfield, Karen C. "Details, Details: Great Reunions Don't Just Happen. To Keep Your Event on Track, Start with These Eight Planning Essentials." CURRENTS 22, no. 9 (October 1996): 20–26.

Bonney, Merilyn H. "All Fired Up: When the Heat of the Reunion Season Hits Campus, Solid Planning Principles Can Keep You Cool and Calm." CURRENTS 17, no. 9 (October 1991): 26–30, 32.

Christion, Laura. "The Competitive Edge: Award-Winning Alumni Administrators Discuss Their Successful Strategies." CURRENTS 18, no. 9 (October 1992): 36–40, 42.

Christion, Laura. "Courting Young Alumni: Nine Program Ideas to Help You Ignite the Interest of Recent Graduates." CURRENTS 18, no. 6 (June 1992): 12–13.

Christion, Laura. "Perfect Combinations: Mix Strategic Thinking with Creative Concepts to Boost Your Programming Efforts." CURRENTS 20, no. 7 (July/August 1994): 42–43.

Deal, Terrence E. "Telling Tales: Is Something Missing from Your Alumni Reunions? Try Using Storytelling to Add Richer Meaning to the Event." CURRENTS 22, no. 9 (October 1996): 8–10, 12.

Dessoff, Alan L. "Programming Partners: Need Lessons on How to Co-Sponsor Student Programs? Here's Some Fancy Footwork Your Alumni Office Can Use." CURRENTS 20, no. 9 (October 1994): 26–30.

Detweiler, Gerri. "Banking on Alma Mater: Alumni Credit Cards, Mortgages, and Other Financial Services Can Benefit Graduates and Boost Revenues. Here's How to Choose the Right Program." CURRENTS 21, no. 9 (October 1995): 18–23.

DeWees, Deborah. "Traditions for Nontraditional Campuses: Homecomings Can Also Benefit Community Colleges." CURRENTS 19, no. 8 (September 1993): 18–19.

Dibbert, Douglas S. "Learning: In It for Life: A CASE Survey Provides an Overview of Alumni Education." CURRENTS 17, no. 5 (May 1991): 20–22.

Evitts, William J. "New Tricks of the Trade: How Alumni Directors Can Bring Creative Ideas to an Unchanging Profession." CURRENTS 20, no. 7 (July/August 1994): 40–44.

Franklin, Christine G. "Loyalty vs. Reality: How to Get Support from Your Graduate School Alumni—Even If You're Last on Their Priority Lists." CURRENTS 19, no. 6 (June 1993): 30–32, 33–34, 36.

Grafton, Steve. "Commitment-Shy Young Alumni: How to Develop a Lasting Relationship with Reluctant Recent Graduates." CURRENTS 18, no. 6 (June 1992): 10–11,13–14.

Hay, Tina M. "Common Ground: Catering to Alumni Who Share Similar Interests Can Strengthen Your Association as a Whole." CURRENTS 16, no. 4 (April 1990): 26–32.

Henderson, Nancy. "Going for Reunion Gold: How to Coach Your Volunteers to Victory in Raising Cash From Classmates." CURRENTS 21, no. 8 (September 1995): 32–36.

Hunter, Barbara Martin. "Fun For All Ages: Want to Plan a Reunion with Mass Appeal? These Ideas Can Help You Draw Everyone from Babies to Baby Boomers, Young Alumni to Older Graduates." CURRENTS 22, no. 9 (October 1996): 14–18.

Jackson, Laura Christion. "Built to Last: Are Your Alumni Clubs in Need of Repair? Use These Ideas to Redesign Your Regional Programming and Increase Its Value." CURRENTS 21, no. 4 (April 1995): 30–34.

Jackson, Laura Christion. "Dream Teams: How Five Alumni Offices Increase Their Effectiveness by Pairing Up With Departments From All Across Campus." CURRENTS 22, no. 6 (June 1996): 35-36, 38.

Jackson, Laura Christion. "On the Road to Alumni: If You Want Involved Graduates Tomorrow, Steer Your Students in the Right Direction Today. This Year-By-Year Road Map Can Help." CURRENTS 20, no. 9 (October 1994): 20–24.

Jackson, Laura Christion. "Small World: You Don't Need a Large Staff to Sponsor Successful Alumni Tours. With These Strategies, You Can Cut Travel Planning Down to Size." CURRENTS 23, no. 5 (May 1997): 22–27.

Kraft, Benjamin. "New Rules for the Road: A Survey Shows Alumni Want Programming With More Social Significance." CURRENTS 18, no. 8 (September 1992): 30–31.

Lange, Scott R. and Ellen Ryan. "Thanks for the Memories: Start a Reunion Gift Program to Help Returning Alumni Help Your Institution." CURRENTS 16, no. 9 (October 1990): 14–19.

Lindemuth, Tim. "A Relative Success: Casting Parents in Leading Roles Can Bring Box-Office Hits to Your Campus." CURRENTS 17, no. 4 (April 1991): 12–13, 15–17.

O'Shea, Catherine L. "Agents of Change: A Class Agent System May Be the Force You Need to Turn Warm Feelings Into Cold Cash." CURRENTS 19, no. 7 (July/August 1993): 6–10.

Osborn, Kathleen T. "Breaking With Tradition: After Your Nontraditional Students Graduate, Reach Them With Alumni Programs Designed Just for Them." CURRENTS 16, no. 6 (June 1990): 42–45.

Perkins, Claranne. "Strategies for Success: A Researcher Studies the Factors that Can Make—Or Break—Alumni Associations at Two-Year Institutions." CURRENTS 18, no. 1 (January 1992): 42–44.

"Reunions in Cyberspace: How Five Campuses Use the World Wide Web to Stage Great Comebacks." CURRENTS 22, no. 5 (May 1996): 8.

Ryan, Robin. "Designing Successful Seminars: Ten Ways to Get Better Results From These Career Events." CURRENTS 22, no. 1 (January 1996): 37.

Scalzo, Teresa. "Beyond the Bottom Line: There's More to Alumni Merchandising Than Just Raising Revenue. To Be Effective, Focus on Your Mission and Alumni Needs." CURRENTS 21, no. 6 (June 1995): 10–14.

Scalzo, Teresa. "The Proof is in the Program: The Best Way to be of Service is to Get Results. Here's How to Create and Evaluate Effective Alumni Activities." CURRENTS 19, no. 1 (January 1993): 30–34.

Schoultz, Cathleen O'Connor. "Getting the Busters and Keeping the Boomers: Mission Impossible? Nah. But If You're Clueless About How to Accomplish a Harmonious Buster-Boomer Membership Blend for Your Association, Here's Help." *Association Management* 49, no. 6 (June 1997): 44, 47–49.

Shoemaker, Donna. "From Research to Results: How to Turn Your Marketing Surveys into Stellar Programs and Services." CURRENTS 19, no. 4 (April 1993): 40–44.

Stinehart, Kathleen and Kornegay, Jane G. "Adult Appeal: To Reach Older, Nontraditional Students and Alumni, Your Association Must Offer a Different Type of Programming. These Seven Ideas Can Help You Satisfy Grown-Up Tastes." CURRENTS 23, no. 4 (April 1997): 34–38.

Taylor, Gordon A. and Cathy Chenoweth Onion. "Let's Get Cookin': The Right Mix of Ingredients and Imagination Will Help You Dish Out Creative Alumni Programs." CURRENTS 16, no. 10 (November/December 1990): 20–23.

Thiers, Naomi. "Make It Meaty: Experienced Reunion Planners Whet Alumni Appetites with Substantive Programs that are a Cut Above the Rest." CURRENTS 17, no. 9 (October 1991): 34–37.

Todd, Barbara Tipsord. *Student Advancement Programs: Shaping Tomorrow's Alumni Leaders Today.* Washington, DC: Council for Advancement and Support of Education, 1993. 167 pages.

Trimarco, Paola. "Taking on the World: International Alumni Programming Needn't be a Daunting Task. Use These World-Class Strategies to Reach Your Overseas Audiences." CURRENTS 20, no. 8 (September 1994): 32–37.

Wallach, Van. "Ingredients for Success: Spice Up Your Class Reunions By Finding Ways to Add More Fun." CURRENTS 21, no. 8 (September 1995): 26–29, 31.

Webb, Charles H. and Paul B. Chewning. *Resource Book in Alumni Administration: Managing Alumni Programs I.* Washington, DC: Council for Advancement and Support of Education, 1993. 160 pages.

Weiss, Larry J., ed. *Parents Programs: How to Create Lasting Ties.* Washington, DC: Council for Advancement and Support of Education, 1989. 239 pages.

This bibliography was prepared by the Council for Advancement and Support of Education Information Center. April 09, 1998

It is never too late to create an alumni relations program. Instead of having to update an outmoded model, newcomers to the process have the opportunity to take a fresh approach. This how-to manual on starting an alumni association will particularly appeal to those with the wit, creativity, and enterprising nature to capitalize on changing times.

From the foreword by
William Evatts, Executive Director of
Alumni Relations at the State
University of New York at Buffalo

CASE
Books
COUNCIL FOR ADVANCEMENT
AND SUPPORT OF EDUCATION

Gordon A. Taylor Jr. is associate vice president for alumni programs at Western Illinois University. He has been program and conference chair for CASE District V, a contributor to CASE CURRENTS, and a conference faculty member at CASE international and district conferences. Under his direction, the WIU Alumni Association has won seven CASE awards, including the Grand Gold Award for overall program excellence in 1994.

Cathy Onion is associate alumni director at Western Illinois University. She is a contributor to CASE CURRENTS, a frequent speaker at CASE international and district conferences, and currently serves on the CASE District V conference committee.

ISBN 0-89964-324-8

BEST COPY AVAILABLE